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**Indiana Academy
of the Social Sciences**

Objectives of the Indiana Academy of the Social Sciences

The objectives of the Academy shall be to facilitate a more effective cooperation among social scientists, to promote the interests of the several social sciences, and to increase the usefulness and advance the effectiveness of both teaching and research in the several social sciences in Indiana.

Established in 1929 and incorporated in 1937, the Academy exists to foster communication and collaboration among social scientists across the public and private colleges and universities of Indiana. The Academy is dedicated to the objectives of supporting social science research and dialogue and to promoting the value and visibility of the social sciences in Indiana while providing an environment in which social scientists across the state can interact in cooperation and friendship. The Academy holds an annual meeting and produces *Endnotes* (IASS newsletter) and publishes the *Midwest Social Sciences Journal*. The Academy currently recognizes all areas of scholarship that utilize social science perspectives and methods.

Directors at Large, concl.

- **Maureen Rutherford** (2023–2026)
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EDITOR'S NOTE

It is my privilege as the editor in chief to bring you Volume 27 of the *Midwest Social Sciences Journal* (MSSJ), the flagship journal of the Indiana Academy of the Social Sciences (IASS), this fall. I am honored to have yet another opportunity to serve the esteemed IASS, having served in various positions since 2005. While the Academy celebrates the 95th year since its inception in 1929, its journal, first published as the *Proceedings of the Indiana Academy of the Social Sciences*, is celebrating its 77th year. In 1997, the journal was rebranded as the *Journal of the Indiana Academy of the Social Sciences,* and from 1997 through 2018 (Volumes 1–21), the Journal established itself as a top-quality scholarly journal in social sciences. In 2019 (Volume 22), the Journal gained a new avatar, the *Midwest Social Sciences Journal*, leading to its current incarnation in 2021 (Volume 24). Our journal is now a diamond open access journal enabling free and easy access for all scholars, our readers, and authors worldwide.

The Journal's evolution represents a natural progression of ideas, research, scope, scale, subjects, and issues that matter most to social scientists. MSSJ provides a perfect venue in our day and age for disseminating research and scholarship on pertinent issues that are universal in nature and have global relevance. These issues reflect on people and society, history and governance, education and health policy, individual and intellectual freedom, fiscal and business organization, social and economic justice, immigration and inequality, crime and violence, globalization and technological disruption, global peace and diplomacy, and a sustainable future for posterity. While basic research in various disciplinary subjects falls into narrowly defined silos, interdisciplinary and cross-disciplinary applied research have wider perspectives and bridge barriers. MSSJ strives for excellence toward the latter. Intellectual debate about pressing societal issues cannot be based on prejudice or intuition alone but rather on serious discourse in academic settings and an abundance of facts. The current issue presents the best of social science research that has undergone our traditional rigorous double-blind peer review and brings you scholarship on some urgent social challenges and issues of contemporary relevance.

In 2023, when Claudia Goldin became the first woman to be sole winner of the Nobel Memorial Prize in Economic Sciences, officially known as the Sveriges Riksbank Prize in Economic Sciences in Memory of Alfred Nobel, for her contributions to gender and labor issues, it seemed fitting to highlight the current progress on gender equality. We invited Joyce Jacobsen, one of the foremost scholars of gender economics, for the lead article, "Are Economic Gender Differences the Same Everywhere? Cross-Societal Comparisons in the Early 21st Century." Professor Jacobsen's article brings us all up to speed on the global patterns of gender differences using the most current data and provides an annotated list of statistical sources for students and researchers to use in exploring these differences We hope that this paper will serve as a useful pedagogical piece, both as a standalone and in the context of various university courses.

The research papers in this volume cover a wide range of topics. The paper by Csikai and Maynard deals with a scoping review of literature on end-of-life issues in older adults. One of the reviewers noted that there had not been many studies looking at older

Western adults and their views on what constitutes a good death, and this paper fills in that gap. There are two policy papers, one about environmental policy and other about the behavioral aspects of fiscal policy. Angadi and Tennekoon apply behavioral economics principles for evaluation of public policies relating to stimulus payments. They study real-world human behavior through a natural experiment and compare the survey results to show that the ex-ante perceptions of benefits by those who did not receive stimulus money differ from the ex-post perceptions of those who did receive stimulus money. The remaining three papers cover a range of topics, from the operating style of the domestic national security organization known as the FBI to the impact of teamwork and comparison of global socioeconomic practices. The paper by Denise Lynn includes an engaging explanation and a scathing review of how the FBI operates, through systematic and detailed historical accounts of a landmark case of a missing spy. Hoffmann and Shinsky throw light on how teamwork can improve the ability and efficiency of nurses and police officers, two vital service providers of our society. The final paper brings us back to gender inequality-related issues. In an extensive cross-national analysis based on data from 41 countries, Jamie Oslawski-Lopez shows, among other important findings, how gender inequality increases outsourcing of household labor in less-egalitarian countries.

The George C. Roberts award recognizes the best paper published in the previous year. Best paper in MSSJ Volume 25 (2022) was awarded in 2023 to Lisa S. Elwood, Samantha Goodin, Christine Naydenov, Nicole Baldonado, Tamara Weaver, and Abigail Kuzma for their paper "Assessment Practices and Experiences of Sex Trafficking in Caseloads of Service Providers Working with High-Risk Youth in Indiana."

We continue to expand our readership. It is heartening that PlumX Metrics (a research metric by Elsevier that measures awareness and interest in a journal) indicates that over the past five years, there have been a total of 22,676 article downloads and 8,762 abstract downloads across 1,684 institutions and organizations from 167 countries, of which the top ten are the United States, the UK, Canada, Germany, the Philippines, India, China, Singapore, Australia, and the Netherlands. The usage data show MSSJ's reach to commercial organizations including Oracle, Palo Alto Networks, and Boeing, and to governmental organizations including the Department of Veteran Affairs, the U.S. House of Representatives, the Ghanaian government, and Shared Services Canada.

I thank our outgoing coeditors, Professors Nirupama Devaraj and Bharath Ganesh Babu, for their service to the Journal and for the digital transformation of the entire submission and review process on the Digital Commons platform by Bepress. The journal is licensed under a [Creative Commons Attribution-Non Commercial-ShareAlike 4.0 International License](). The membership of Crossref enables assigning of a digital object identifier (DOI) to each article *and* ensures that MSSJ is committed to intellectual integrity, rigorous standards of scholarship, and rational and civil discourse.

The editorial team has expanded, and five distinguished scholars representing a diversity of areas of research and educational institutions have joined our inaugural Editorial Board. These scholars are Professors Demetra Andrews of Kelly School of Business at IU Indianapolis, Ethan Hollander of Wabash College, Mark Hoyert of Indiana University Northwest, Michael J. Raley of Hanover College, and Arun K. Srinivasan of

Indiana University Southeast. This collaboration will bring the synergy to keep moving us forward. Please welcome our inaugural Editorial Board!

I recognize and thank our many referee-reviewers, who provide invaluable professional service to the journal pro bono, evaluating papers, providing comments and suggestions, and helping ensure that papers published in this volume of MSSJ maintain the highest standards of scholarly excellence. The names of the reviewers who have served over the past fifteen years are published at the end of the Journal.

I express my deepest appreciation for Stephanie Seifert Stringham, copy editor of this volume and of the Journal since 2010. Stephanie continues to provide monumental service behind the scenes, providing detailed attention to accuracy and highest professional standards. Stephanie's efforts and promptness made it possible to bring out this volume in time for release during our annual conference.

I am grateful to Jonathan Bull, our publishing advisor, who brought me on board the digital platform of MSSJ and showed me the inner workings of the system. I am extremely mindful of Jon's generosity with his time and willingness to help every step of the way at a super short notice this entire year, for which I remain grateful. The Academy acknowledges Valparaiso University for hosting MSSJ on ValpoScholar.

Thanks go to Micah Pollak and Yllka Azemi for the design of the cover page for this issue of the Journal.

This editorial wok for MSSJ would not have been possible without the unwavering and constant support for the Academy and the Journal from the leadership of Indiana University Northwest. I am especially grateful to Interim Executive Vice Chancellor for Academic Affairs Dean Cindy Roberts and Interim Chancellor Vicki Roman Lagunas for their perpetual support of my association with the Journal.

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MISSION AND EDITORIAL POLICY

The purpose of the *Midwest Social Sciences Journal* is to promote and advance the social sciences in Indiana by publishing the highest quality social science theory and research papers available. MSSJ recognizes and supports the many diverse perspectives and methods across the several social sciences; it neither espouses nor champions any specific ideological, theoretical, methodological, or political commitments.

MSSJ is committed to intellectual integrity, rigorous standards of scholarship, and rational and civil discourse. It encourages the presentation and free exchange of diverse viewpoints and seeks to foster open and critical inquiry that privileges no particular standpoint while operating within the limits of a standard of discourse and reason that distinguishes between the pursuit of knowledge and truth versus mere assertions of dogma.

Although every effort will be made to publish issues that represent a fair balance of scholarship across the entire spectrum of social science disciplines, the Journal's first priority will always be to publish the best social science research available at any given time, regardless of disciplinary representation. Toward this end, papers will be accepted for editorial review and publication in the annual issue of the Journal at any time of year, whether or not they were presented at the Annual Conference. Persons who submit articles for review are expected to adhere to Author Submission Guidelines detailed elsewhere in this Journal and online at https://scholar.valpo.edu/mssj/.

The Journal was published annually both in print and online in the autumn from Volume 14 to Volume 19. Beginning with Volume 20, the Journal is available only digitally. Papers submitted for possible publication are subject to a double-blind review process using Bepress. The editor alone is responsible for making the final decision on all manuscripts and content for publication in the Journal. Their decision on publication content is not subject to review by any other member, officer, or body of the Indiana Academy of the Social Sciences.

CONTENTS

Invited Paper

Are Economic Gender Differences the Same Everywhere? Cross-Societal Comparisons in the Early 21st Century

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ABSTRACT

Are gender differences in economic outcomes the same everywhere? Using the most recent available data (generally from the 2021–2023 period), I consider the patterns for these gender differences and provide an annotated list of statistical sources for students and researchers to use in exploring these differences. Overall, women still work less than men in paid work, work more than men in unpaid household work, and make less than men; however, these patterns have converged somewhat, with some narrowing of work and pay gaps relative to the last part of the 20th century, and with women rapidly closing the educational-attainment gap and even exceeding men's educational attainment in a large number of countries. Human development is correlated with reduction of gender differences even as regional disparities remain in both human development and gender differences.

KEY WORDS Gender Differences; International Gender Comparisons; Gender Statistics

Are gender differences in economic outcomes the same everywhere? Using the most recent available data (generally from the 2021–2023 period), I consider recent patterns for these gender differences. This structure is partly based on the structure I developed in the context of my textbook, *The Economics of Gende*r, through three editions (Wiley-Blackwell, most recent edition, 2007) and continue to update as needed for teaching purposes. This paper will hopefully serve as a useful pedagogical piece, both as a standalone resource and in the context of various university courses.

The second section of this paper considers those countries that I refer to as industrialized capitalist societies, which tend to operate as political democracies (with

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various levels of participation and democratic-ness). The third section addresses the question of how social and economic development processes affect gender differences as countries change over time in their levels of industrialization, capitalization, and democratic-ness. Herein, we look at the entire set of countries for which data are available and consider gender differences by development level and by region.

Data accessibility has greatly increased since I last updated my textbook, so students and researchers are now able to generate online results very quickly, often including formatted charts, graphs, and maps, for individual countries and sets of countries. I highlight important data sources that can be used to study gender differences within and across countries and give examples of their use. The annotated list of references in the fourth section of this paper gives the main online data sources for country-level data that can be used to analyze gender differences across countries.

In this paper, *society* is treated as being synonymous with *country*, although social groups exist within each country that may differ greatly from the majority of the population in terms of various social and economic indicators. For many countries, it is still difficult to obtain gender-disaggregated data by group within country, or even often by geographic area within country, and these data are not as readily available online; thus, there are still many levels to be studied across both time and space in answering the fundamental question that I have posed above, and the question remains a perennial one for students and researchers to consider.

GENDERED ECONOMIC PATTERNS
IN INDUSTRIALIZED CAPITALIST SOCIETIES

In this section, I use data for the 38 (as of mid-2024) member countries of the Organisation for Economic Cooperation and Development (OECD). This grouping is partly data-driven, as these countries have roughly comparable data collection and presentation methods, but also makes sense as these countries generally rank high on the United Nations' Human Development Index and other measures of relative well-being. Seven of these countries (Czechia, Estonia, Latvia, Lithuania, Poland, Slovak Republic, and Slovenia) were in the Eastern European socialist sphere prior to the early 1990s but have aligned with Western Europe, as did East Germany, and their outcomes now look very similar to those of the other OECD countries.

The fundamental comparisons to make are generally about work patterns, both paid and unpaid, and regarding compensation for paid work. Additional information about many other measures has become increasingly available, and I highlight two other measures of gender difference, in proportion of corporate board membership and in higher (tertiary) educational attainment, in this section. There is also more information readily available about legislation and executive orders affecting gender discrepancies, such as legal ramifications of sexual harassment, and in the third section, I show two such maps that can be generated to show which countries have more legislation addressing gender discrimination in employment, and sexual harassment.

Generally, the starting point in making gender comparisons is labor force participation rates by gender, where *labor force* implies people are working for pay or

actively looking for paid work (so will include persons who are currently unemployed). Such data generally refer only to the middle-age range of the population (generally, ages 15 or 16 to 64). Figure 1 presents the range of labor force participation rates for the OECD countries using the most recent available data.

Figure 1. Labor Force Participation Rate (%) among 15–64–Year-Olds, by Gender
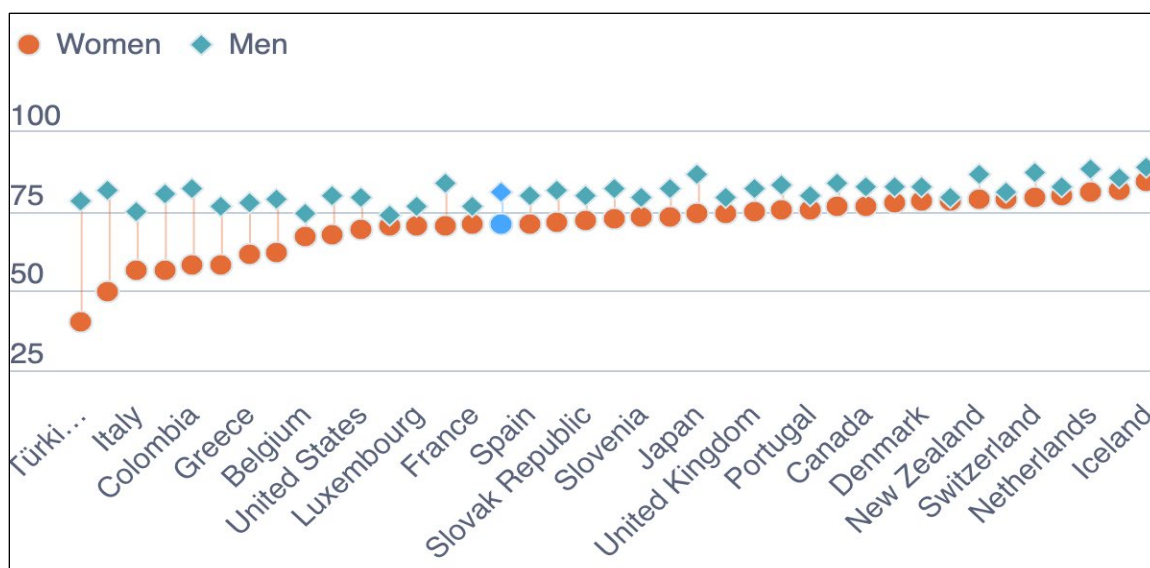
Note: Created July 2024 with data from 2022 or latest available year.

Source: OECD (n.d.).

Note that all of these figures are better experienced online, as these print versions both suppress some of the country labels and lose their interactivity; in the online version, one can click on each dot and see the actual value associated with the dot. In these data, which are sorted in order of women's participation rate, we can see that men have much less variation in their labor force participation than do women and that in all countries, men have a higher participation rate than women, although the rates are quite close in a number of countries. The range of values for women is from 40% (in Turkey) to 84% (in Iceland), with an OECD mean value of 71%; the lowest rate for European members of the OECD is Italy, at 56%. Meanwhile, the OECD average for men is 81%, ranging from a low of 74% in Israel to a high of 89% in Iceland. This represents a significant change for both women and men over the past fifty or so years: The rate in 1969 was 91% for men and 45% for women (Jacobsen 2007:Ch. 10), so women's participation has risen much more than men's has fallen; however, they are still not equal.

After the fall of the Soviet bloc and the dissolution of much of the socialist structure in those countries, women's labor force participation generally dropped in eastern European countries. Meanwhile, most other countries have continued to log rises in formal

participation for women, with some exceptions, notably Afghanistan, where women's work has decreased or stagnated. Much of the rise appears to be tied to the continuing process of increased urbanization in countries, which tends to bring both women and men increasingly into the formal employment sector and thus makes their labor more discoverable. Countries with continuing large agricultural sectors have less formal women's participation as well.

Another fundamental comparison to make by gender is the amount of time spent in unpaid forms of labor. Figure 2 displays the gender gap in unpaid care and housework for the OECD countries, again using the most recently available data.

Figure 2. Gender Gap in Unpaid Care and Housework (Minutes per Day)
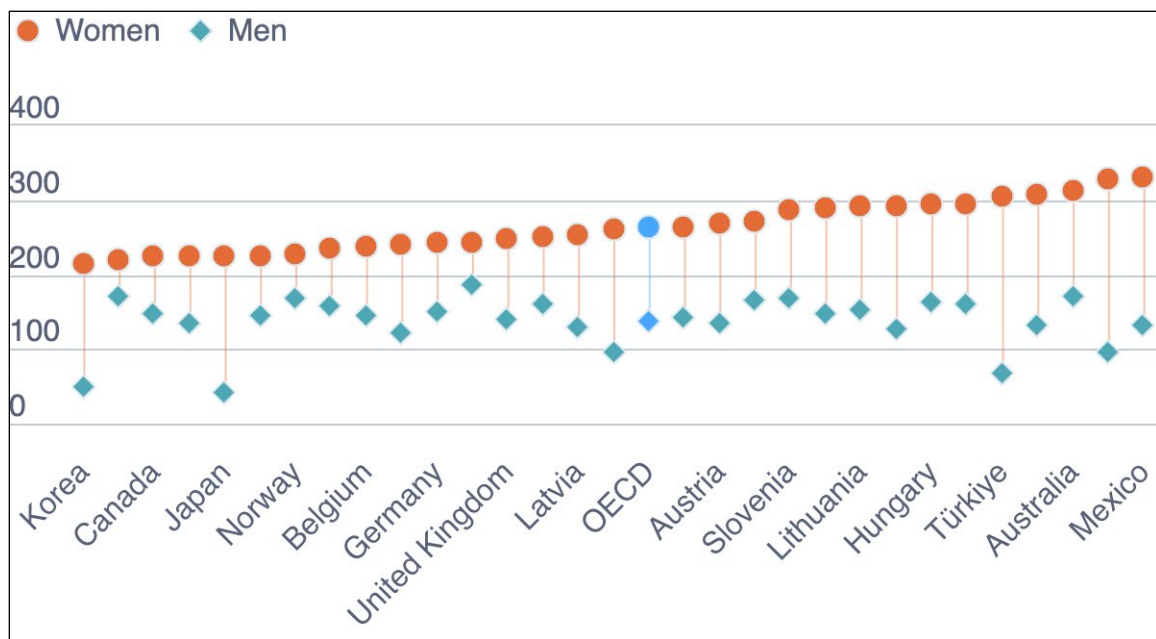
Note: Created July 2024 with data from 2021 or latest available year.

Source: OECD (n.d.).

These data are harder to track over time than formal work participation, as time-use data are not generally collected as regularly as labor force data and do not exist as readily for earlier periods; however, it is clear that women continue to do more household labor than do men in every country, with the most substantial gaps occurring in the non-European countries in the OECD. Women's range of time spent in household labor is narrower than for men, ranging from 215 minutes in South Korea to 331 minutes in Mexico, while men's time spent ranges from 41 minutes in Japan to 186 minutes in Denmark. It is notable that the amount of time spent in household labor by women does not appear to vary much with their labor force participation. At the OECD average, women spend 4 hours and 20 minutes

per day in unpaid labor, while men spend 2 hours and 15 minutes, so two hours a day more for women than for men; however, given that men work more for pay than do women, their total hours of work are not as different. The women and men experiencing the most time crunch are generally those who are working full-time for pay and raising children; they are likely those most in need of assistance, given their life-work–balance challenges.

In less developed societies, time diaries have been instructive regarding how much time women have to spend in basic tasks such as collecting water and firewood (Jacobsen 2007:Ch 12). Improvements in water availability and shifts to different fuel sources can free women from much of this physical labor but do not necessarily shift women's time into paid work (Jacobsen 2011). Technology thus can have effects on the time spent in different activities but does not always mean that people reduce the total amount of time spent in household work, as people can simply adjust what they do within the category. Interestingly, one of the biggest technology-driven time savers for both women and men has been the widespread adoption of the mobile phone. Phones allow information to be shared cheaply and quickly, often saving people long and useless trips if it turns out that there is a weather- or shipping-delay reason not to make a given trip. They also allow people to better balance supervision of children and other dependents because they can be just a phone call away and can respond quickly to challenging situations.

A third fundamental comparison is between women's and men's earnings. Earnings may differ both because women and men work different numbers of hours annually (with women having both higher rates of part-time work and lower rates of overtime work in general than men) and because they are paid at different rates for an hour of labor. Figure 3 shows the gender wage gap, measured at the median wage level as percentage of men's wages, again using the most recently available data.

These data display a wide range of gap sizes across the OECD countries, with Luxembourg at practically equal wages (just 0.4 percentage points short of equal) and South Korea on the other extreme, with a 31% differential. The mean difference in the OECD is 12 cents on the dollar (or Euro), so women make 88% as much as men on an hourly basis. This is a significant improvement over time, with much of the improvement occurring starting in the 1990s. In the early 2000s, the mean difference for these countries was about 24 cents on the dollar and Luxembourg was at 29 cents on the dollar (Jacobsen 2007:Ch. 10). South Korea has improved much less, however, as its differential in the early 2000s was 36 cents. In some countries, particularly where women are more likely to be found in manufacturing jobs and where many men are still in agricultural (and many women still not working for pay), it is possible for the recorded women's wage to be higher than the men's wage (Jacobsen 2007:Ch. 12, Table 12.3).

Why do we see these gender differences in pay? There are numerous causes, but one strong pattern is that women and men are still mostly found to be working in very different parts of the overall labor market. In particular, occupational gender segregation is still a very strong pattern across countries, both developed and developing (Carranza, Das, and Kotikula 2023). McCaughey (2023) notes that in the European Union, one-third of the workers are in male-dominated occupations, one-quarter are in female-dominated occupations (where women constitute more than 80% of the workers), and only a quarter are in mixed-gender occupations. Often within occupations, there is additional segregation

by subspecialty, such as different kinds of medical areas, or type of firm (Jacobsen 2007:Ch. 6).

Figure 3. Gender Wage Gap (% of Median Wages of Men)
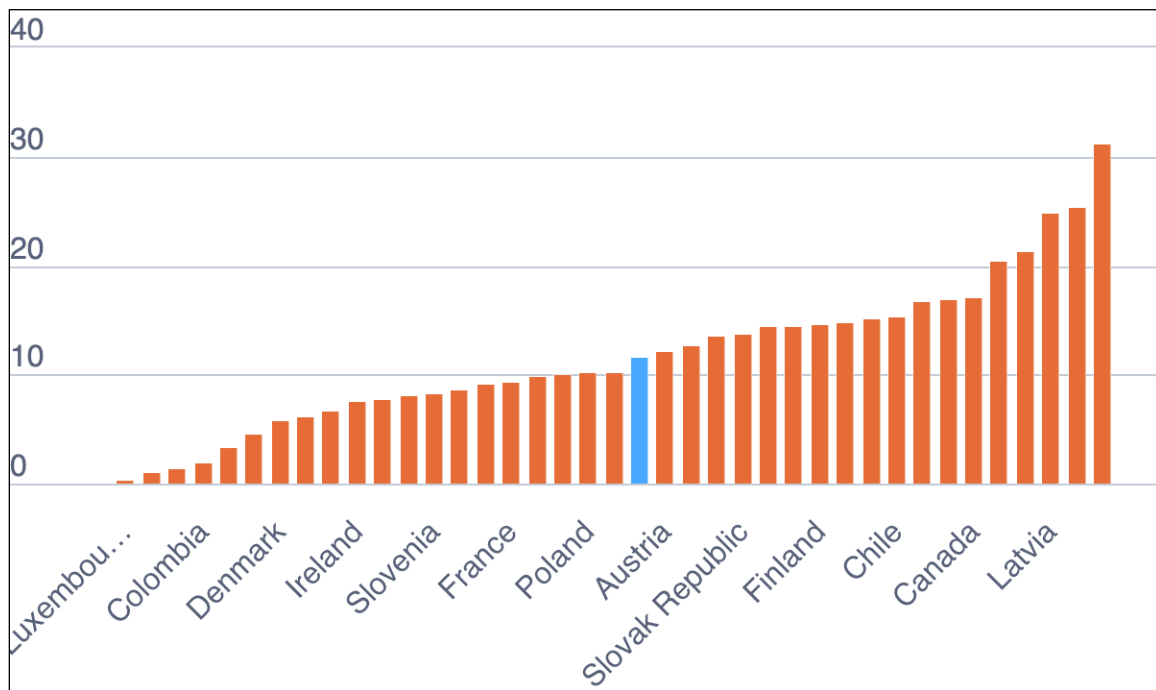
Note: Created July 2024 with data from 2022 or latest available year.

Source: OECD (n.d.).

In one notable form of workplace segregation, women are still less likely to be found at the highest levels of management and control. Notably, McCaughey (2023) points out that two-thirds of workers in the European Union have a male boss. Figure 4 shows the share of women on large company boards in OECD countries.

The share in these data for women ranges from Estonia, with 10% on the low end, up to New Zealand, with 46% on the high end, with an average of 30%—and no country at 50%. New Zealand has been actively working to increase women's representation in politics and industry with notable effects, even though formal quotas have not been installed.

One of the most interesting trends over time has been the increase in women relative to men in educational attainment, including tertiary, or higher, education. Figure 5 shows the relative shares of working-age population by gender that have higher education.

This increase in formal education explains much of women's increased earnings over the past fifty years, along with some increase in labor market experience. Without this

higher education/investment in human capital and the entry to higher-earning professions that this occasioned, women's earnings might well have remained stagnant; nonetheless, increased education has not closed the earnings gap. Part of this appears to be because women and men continue to study different fields, with men often found in the more lucrative and still more male-dominated occupations and subfields within occupations. Carranza et al. (2023:Table 1) show that fields of study across a wide range of countries (more than 100 in their sample) are mainly either female- or male-dominated rather than neutral, with education, health and welfare, and humanities and arts being more likely to be female-dominated, engineering, manufacturing and construction, science and agriculture, and services being more male-dominated, and only the areas of social sciences, business, and law being more likely to be neutral rather than dominated by one or the other gender across the sample of countries. Women's continued underrepresentation in the more-lucrative STEM areas, as well as in the more-lucrative business specialties such as finance and operations, continue to reduce their earnings potential relative to men's. Whether this is by pure choice or by a combination of adherence to social norms by both students and their families, the more welcoming nature of some occupations relative to others for particular genders, outright discrimination, and the greater ability to combine some occupations with household and childcare duties, these patterns persist and make it rare that an occupation and every area within it is fully gender integrated.

Figure 4. Percentage of Women on Boards of the Largest Publicly Listed Companies
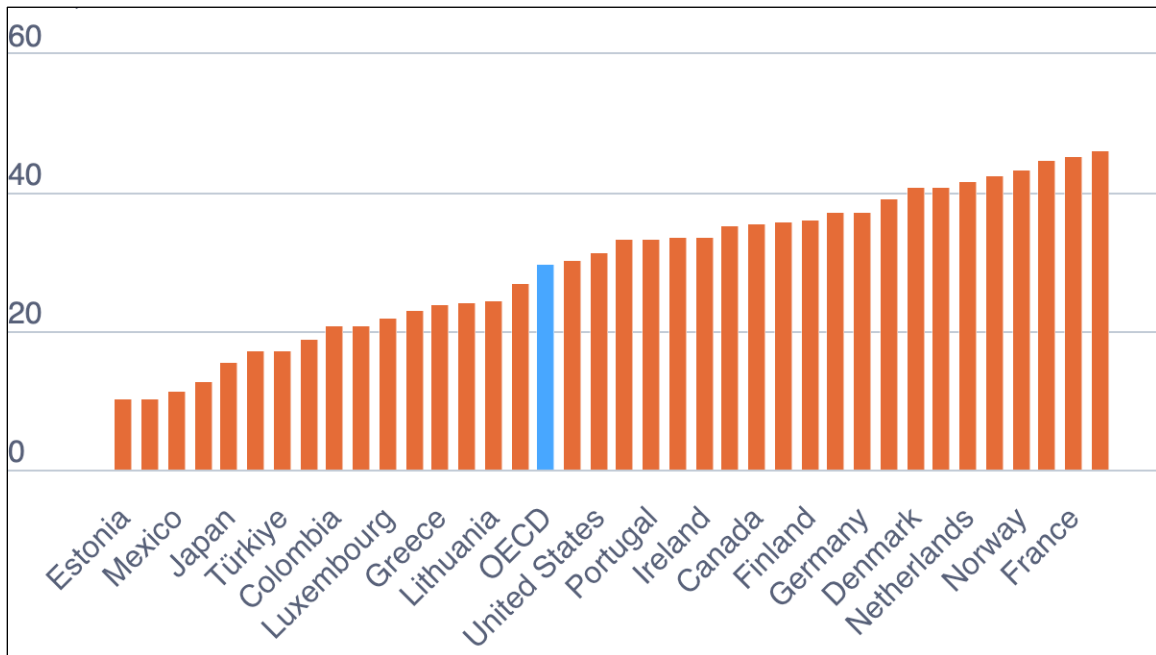
Note: Created July 2024 with data from 2022.

Source: OECD (n.d.).

Women's tertiary educational attainment ranges from a low of 20% in Mexico to a high of almost 70% in Canada, while men's attainment ranges from a low of 17% in Italy to a high of 56% in Canada. In only two countries (Switzerland and South Korea) is men's attainment higher than women's; meanwhile, the gaps are much larger and in the opposite direction in many countries, with the largest gap between the rates in Estonia (53.5% for women vs. 30.8% for men, for a percentage point gap of 22.7). The OECD means are 44% for women and 37% for men. This significant increase in women's higher educational attainment is one of the most notable stories of the past 50 years, as few women (let alone men) had achieved higher education even by the middle of the 20th century. Much of this growth occurred starting in the 1980s and 1990s as a wider range of professional fields opened up to women and more masters' degrees were developed so that even more women started going to postbachelor degree programs as well.

Figure 5. Share of Population (%) Aged 25–64 Who Attained Tertiary Education, by Gender
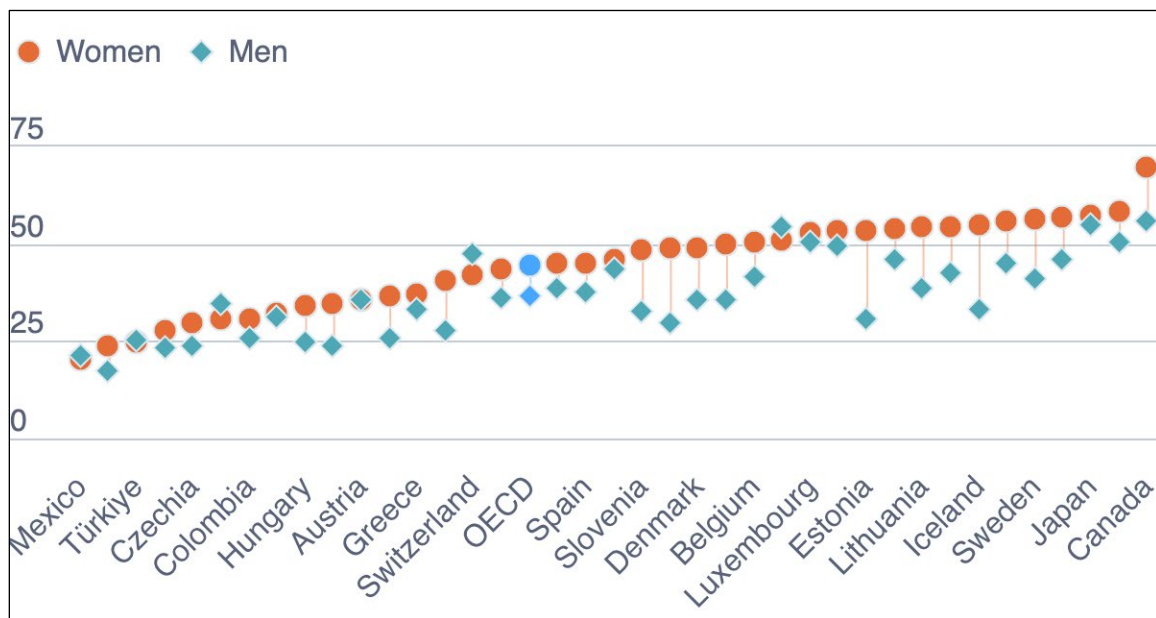
Note: Created July 2024 with data from 2022 or latest available year.

Source: OECD (n.d.).

Just as we have seen progress on a number of encouraging fronts, there remain barriers to full and equal participation by women and men in all walks of life. Even in the most advanced countries, gender differences persist. Let us turn now to considering a fuller set of countries to see how the level of human development and regional differences relate to gender differences on a set of development indicators.

EFFECTS OF THE DEVELOPMENT PROCESS
ON GENDERED ECONOMIC PATTERNS

The implication of the previous section was that economic and social progress, including general increases in the standard of living and education for societies over time, have reduced gender differences but have not eradicated them. If this holds true over time for societies as they individually progress to higher standards of living, the implication is that societies, compared at the same point in time but at different stages of economic and social progress (including improved health measures as well as educational measures), would also demonstrate a relationship of greater gender equality for those countries at higher levels of human development. This proposition can be tested by seeing if the larger set of current world countries for which we have data on economic and social measures show such a relationship.

This exercise is performed regularly by various agencies, in particular the World Bank and the United Nations (UN). The UN Development Programme's Human Development Index (HDI), first developed in 1990, which includes measures of life expectancy, educational attainment, and per capita income, has been accompanied since 1995 by the Gender Development Index (GDI), which shows the difference when the human development index for a country is calculated separately by gender. The HDI and GDI were subsequently reformulated to include both expected years of schooling and mean years of schooling rather than adult literacy as the measure of educational attainment. The Gender Inequality Index (GII), introduced in 2010, considers elements of reproductive health (maternal mortality and adolescent birth rate), empowerment (women's share of seats in parliament and secondary education attainment), and the labor market (labor force participation rate) and can also be calculated by level of HDI even though the two do not contain the same elements.

Table 1 contains the value of the HDI and GDI at different levels of human development and for different world regions, including the OECD group and the world overall. Countries are divided into four human development groups: very high, high, medium, and low. There is a clear relationship between higher (better) values of the HDI and higher (better) values of the GDI, although the big break occurs between high and medium human development. Across world regions, the GDI is lower in South Asia and the Arab States, while sub-Saharan Africa, even though it has the lowest HDI values of all the regions, is in the middle, with East Asia and the Pacific, Europe and Central Asia, and Latin America and the Caribbean regions all higher (with Latin American and the Caribbean having the highest average value). The OECD average is comparable to the very high human development average, and the World average is in the middle of the range.

It is interesting to look also at the individual components of the GDI. Women have higher life expectancy than men in all human development categories and world regions. They have higher or equal expected years of schooling than men in all but the low human development category and across all regions except the Arab States, South Asia, and sub-Saharan Africa, but their current mean years of schooling still lag behind men in all regions, partly as a function of older generations of women having received less education than men. The biggest difference is in the estimated gross national income per capita, where women have an average of 57% of men's income worldwide, 64% in the OECD, and lows

of 24% in the Arab States, 27% in South Asia, and 32% in medium human development countries. They do better relative to men in low human development countries, at 47% of men's income, and their highest relative earnings are in sub-Saharan Africa, at 69% of men's income. Both the low human development category and sub-Saharan Africa have the lowest values for men's income by far, so having relatively equal earnings when neither gender is earning much is not a happy situation; however, this pattern is indicative of the fact that once earnings start rising, gender-earnings inequality tends to increase.

Table 2 contains a similar analysis as in Table 1, for the GII. Here, lower values of the index indicate less gender inequality. There is a clear pattern of decreasing gender inequality as development level rises. Similar to Table 1, across regions, the areas of more concern for gender equality and development are the Arab States and South Asia, but here, sub-Saharan Africa has the highest index, indicating greatest concern. In looking at the components of the GII, it appears that the dismal health measures for sub-Saharan Africa are a big driver of this low outcome, as the maternal mortality ratio and adolescent birth rate in this region are both much higher than in the other regions, as is true for the low human development group. Share of seats in parliament is very similar across human development groups but lower in the Arab States and in South Asia. The percentage of the population with at least some secondary education shows a discrepancy favoring men in all development groups, with the biggest difference in the medium human development group. All regions except Latin America and the Caribbean (where the shares are almost equal by gender, with women slightly higher) also show this difference, with the largest differences in South Asia followed by sub-Saharan Africa. Finally, the labor force participation rate shows the usual discrepancy with men's rate being higher for all development groups and all regions, with the largest differences in the Arab States (50 percentage points), South Asia (48 percentage points), and the medium human development group (41.5 percentage points).

There are a number of critiques of both the GDI and GII measures on numerous grounds: what they signify, what is included and not included, and how they are constructed and weighted. The current GDI and the new GII both arose in response to critiques of earlier versions of measures but have received their own rounds of criticism (compare Berik 2022 and Klasen 2017). One of the main limitations on index construction is data availability, and indexes will always be subject to critique, as they must apply some reductive principle in order to collapse a complex set of factors into one number. Numerous other measures have been proposed by various individual researchers and a number of agencies and thinktanks, and no doubt, other measures will be used in the future as more data become available.

Table 1. Human and Gender Development Indexes and Constituent Parts, by Development Groups and Regions, for the OECD and the World Overall, 2022

	Gender Development Index value	Human Development Index value		Life expectancy at birth (years)		Expected years of schooling		Mean years of schooling		Estimated gross national income per capita (2017 PPP $)	
		Female	Male	Female	Male	Female	Male	Female	Male	Female	Male
Human development groups											
Very high human development	0.988	0.895	0.906	82.3	76.4	17.1	16.1	12.2	12.3	34,726	55,442
High human development	0.962	0.747	0.777	78.0	72.5	14.8	14.2	8.3	9.0	10,904	20,011
Medium human development	0.870	0.587	0.675	69.9	66.1	12.3	12.3	5.8	7.6	3,127	9,638
Low human development	0.868	0.478	0.551	63.7	59.7	8.9	9.6	3.9	5.5	2,073	4,368
Regions											
Arab States	0.877	0.646	0.736	73.5	69.3	11.8	12.0	7.2	8.3	5,468	22,726
East Asia and the Pacific	0.962	0.749	0.779	79.0	73.6	14.8	14.2	7.8	8.7	11,939	20,216
Europe and Central Asia	0.963	0.785	0.815	77.0	70.2	15.5	15.5	10.4	10.8	13,573	26,631
Latin America and the Caribbean	0.991	0.758	0.765	76.9	70.6	15.3	14.2	9.0	8.9	11,503	18,823
South Asia	0.855	0.580	0.678	70.4	66.7	11.8	12.0	5.7	7.5	2,958	10,808
Sub-Saharan Africa	0.915	0.525	0.574	62.6	58.7	10.2	10.5	5.2	6.9	3,025	4,388
OECD	0.984	0.898	0.912	82.9	77.4	17.1	16.1	12.1	12.3	36,106	56,848
World	0.951	0.719	0.756	74.5	69.6	13.1	12.9	8.2	9.1	12,516	22,035

Source: UNDP (2024:Statistical Annex, Table 4).

Table 2. Gender Inequality Index and Constituent Parts, by Development Groups and Regions, for the OECD and the World Overall, 2022

	Gender Inequality Index value	Maternal mortality ratio (deaths per 100,000 live births)	Adolescent birth rate (births per 1,000 women ages 15–19)	Share of seats in parliament (% held by women)	Population with at least some secondary education (% ages 25 and older)		Labor force participation rate (% ages 15 and older)	
					Female	Male	Female	Male
Human development groups								
Very high human development	0.150	15	13.5	29.3	87.7	90.1	54.0	69.4
High human development	0.339	65	28.7	26.0	74.0	78.4	49.8	74.2
Medium human development	0.476	152	37.8	23.0	40.5	55.6	34.2	75.7
Low human development	0.579	497	88.3	24.0	21.3	31.9	50.8	77.5
Regions								
Arab States	0.523	128	44.2	18.3	51.0	57.4	19.9	70.2
East Asia and the Pacific	0.340	78	21.4	21.0	72.5	79.0	54.0	75.4
Europe and Central Asia	0.224	21	19.5	26.0	83.7	89.9	45.4	69.6
Latin America and the Caribbean	0.386	85	52.3	34.1	64.4	64.2	51.6	75.3
South Asia	0.478	132	27.9	17.9	40.9	55.7	28.1	76.3
Sub-Saharan Africa	0.565	516	99.3	26.4	30.9	42.0	63.9	76.4
OECD	0.194	21	18.5	32.7	86.7	89.3	53.0	68.7
World	0.462	215	41.9	26.2	64.1	71.0	46.8	73.9

Source: UNDP (2024:Statistical Annex, Table 5).

These data nevertheless tell a consistent story about which regions are moving toward greater gender equality, which ones are lagging, and that human development generally increases gender-specific development and gender equality. As countries become better off, however, while the health and education measures improve for women, the economic differences in terms of labor force participation and per capita income become more salient, impeding further progress in closing the gender inequality gap.

While the indicators included in the HDI/GDI and GII have been deemed to be the most useful in terms of the tradeoff between data availability and representation of areas of interest, numerous other indicators are tracked to monitor progress toward gender equality. An interesting alternative approach to measuring well-being is the World Happiness Report project, operating since 2012, wherein a worldwide sample of people is surveyed regarding their happiness. Here, the gender disparity is that men in low-income countries generally report lower happiness than do women, although the gap has narrowed following the pandemic, and girls in high-income countries report lower satisfaction than do boys, although there is no overall gender gap in high-income countries (Helliwell et al. 2024).

Overall, the very fact that many agencies, governments, and individuals now take gender equality as a societal goal as unassailable is a sign of great progress. Although there may be those who doubt that complete equality is attainable and also question whether equality of opportunity may not necessarily lead to equality of outcome, the cooperation of official groups in advocating for and increasing legal structures and policies that approve the concept of gender equality is crucial in countering social norms that push away from equality.

One element of progress toward gender equality has been the increased sign-on of many countries to antidiscrimination and anti-harassment policies and legislation as well as numerous other pro–gender-equality actions. For example, Figure 6 shows which countries have prohibitions against sex discrimination. Almost all countries have such laws on their books at this point, although there are notable outliers, such as Algeria and Iran.

Figure 7 shows which countries have legislated against sexual harassment in employment. The vast majority of countries, including most of the OECD group (except Japan) has passed such legislation, although not as many as have antidiscrimination laws on their books, and Russia is a notable outlier. Of course, having laws on the books and actively enforcing them are two different things. In the United States, legislation preceded active enforcement by about a decade and court backlogs can lead to long waits for legal action and preemptive settlements of antidiscrimination suits; nonetheless, the existence of such laws is a heartening official statement about societal intentions to move toward greater gender equality.

As countries continue their slow convergence toward common structures of law and market—albeit with many bumps, stalls, and retrogressions along the way—it appears that gender differences are not yet the same everywhere, as some areas still evince much larger differences; however, the correlation of reduced difference with increased human development, particularly in health outcomes for women across regions, leads to the hope that we will see continued progress in reducing these differences, although the intractability of fundamental economic differences by gender indicates that the road to complete gender equality is not certain and societal well-being does not lead automatically to income convergence in particular.

Figure 6. Countries Prohibiting Gender Discrimination in Employment

Source: World Bank: Women, Business and the Law. https://wbl.worldbank.org/ Data Retrieved from World Bank Gender Data Portal.
License Type: CC BY-4.0.
https://genderdata.worldbank.org/en/indicator/sg-law-nodc-hr
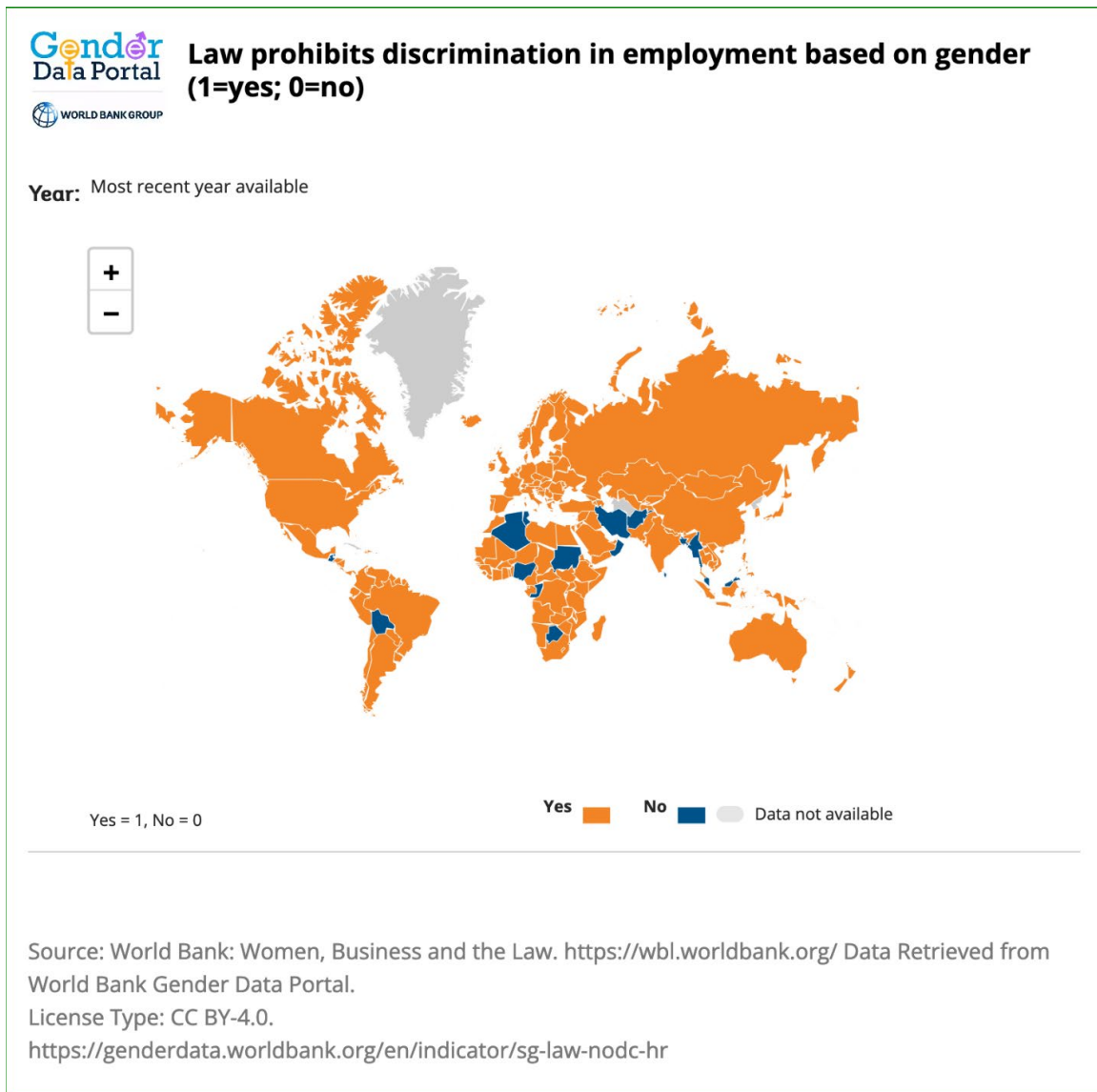
Additionally, more attention needs to be paid to gender differences within countries as well as between countries. Country-level data subsume many differences that can be found between rural and urban areas; between regions; and between racial, ethnic, and class groups within countries. Much remains to be both studied and addressed in the area of economic gender differences.

Figure 7. Countries with Legislation against Sexual Harassment in Employment

Source: World Bank: Women, Business and the Law. https://wbl.worldbank.org/ Data Retrieved from World Bank Gender Data Portal.
License Type: CC BY-4.0.
https://genderdata.worldbank.org/en/indicator/sg-leg-sxhr-em
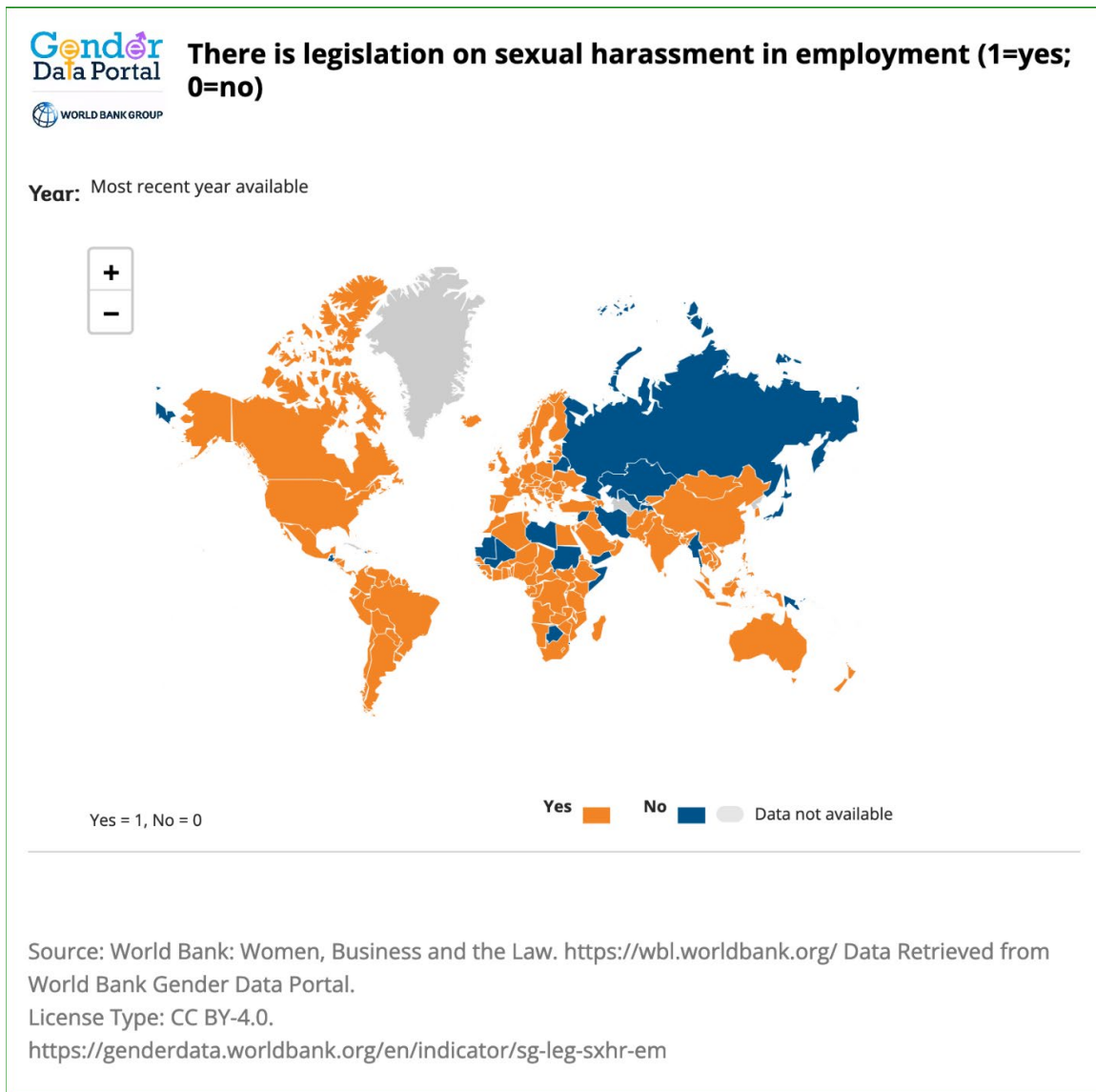
STATISTICAL SOURCES FOR INTERNATIONAL DATA
RELATED TO GENDER OUTCOMES

More data that are disaggregated by gender are being collected, and some countries (Sweden and the Philippines, among others) make a point of trying to disaggregate by gender as much as possible. This has made analysis of gender differences easier, although it may be hard to extend the analysis back in time. Almost no such data are available in systematic form before World War II, and routine collection of labor force and other data

did not start in general before the 1970s and were often not available in computer-readable form before then.

Data availability and quality vary substantially across countries. Many of the countries discussed in the second section have made great strides in regularizing their data collection, using common definitions for their data, and cooperating through agencies such as Eurostat and the OECD in sharing and aggregating their data. A number of other countries also take data collection seriously and run regular household and labor force surveys to collect data at standard intervals. Time-use data have also become more widely available, with several countries now collecting time-use data fairly regularly (e.g., the American Time Use Survey, ATUS, https://www.bls.gov/tus/); however, countries with fewer resources can struggle to collect data regularly and systematically, and civil war, invasions, and other forms of strife often disrupt data-collection efforts. Some data sites are clearer about labeling the relative reliability of the data; others, not so much. It is also often clear which countries are struggling to collect regular data, because they may be missing from the database or only have older years of data available. Other countries may suppress data because they do not want the information known. For instance, China suspended youth unemployment data in mid-2023 because it was so high, then changed the way youth unemployment was calculated when the data started to be released again in January 2024 (Soo 2024).

Most of the data on the pages listed below are collected by individual country statistical agencies, either from data reported to the government as part of another purpose (such as businesses reporting data for tax purposes) or as part of a survey done specifically to collect a sample of data. Many countries also perform censuses from time to time, attempting to collect data from everyone rather than from a random or specific sample of persons. For example, the United States collects census data once every decade but also collects labor force survey data monthly and has many other regular data-collection projects. A number of international agencies, such as the United Nations, have attempted to get countries to standardize their data definitions and collection systems or are sometimes able to reclassify data that they receive from countries into more standard formats. Some groups, such as the U.S. Census Bureau, also create their own projections of information for their own and other countries. A common projection would be to create an age-gender pyramid so as to project the number of women and men at different ages in a country. This can also be used, along with current and projected fertility rates, to project future population numbers for different countries.

Many other surveys exist for different countries and different subgroups within countries that are performed by researchers on a one-time or continuing basis; however, their more ephemeral and often time-delineated nature makes them of less use for cross-country and within-country comparisons over time. They are less likely to be standardized and also may contain qualitative information that is hard to code and compare across time and space. Some projects attempt to use such information systematically, however; the Human Relations Area Files (https://hraf.yale.edu/) is a depository that contains such information drawn from numerous ethnographic and other studies, and it contains interesting data on gender differences across societies.

Listed below are the main international statistical sites that students and researchers can use to get systematic cross-country data disaggregated by gender.

Eurostat. Eurostat (https://ec.europa.eu/eurostat) is the statistical agency for the European Union (currently 27 countries) and has a general database site (https://ec.europa.eu/eurostat/web/main/data/database) as well as its own gender statistics site (https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Gender_statistics).

International Labour Office (ILO). The ILO (www.ilo.org) collects statistics for the labor force by age and sex, employment and earnings statistics by sex, and proportion of women in management positions for all countries where data are available. The ILO maintains an online statistical database (https://ilostat.ilo.org/) and a labor document database (http://labordoc.ilo.org/).

International Monetary Fund (IMF). The IMF (https://www.imf.org/) doesn't itself generate that many statistics that are directly relevant to gender, but it does issue research reports related to gender (https://www.imf.org/en/Topics/Gender), and many of its stats can be useful for relating economic growth and financial data to gender outcomes (https://www.imf.org/en/Data).

Organisation for Economic Cooperation and Development (OECD). The OECD (https://www.oecd.org/) has a data-explorer interface (https://data-explorer.oecd.org/); a Gender, Institutions, and Development database; and a social institutions and gender index that they calculate from these data for 140 countries (both of these can be accessed through the data explorer). They also have a dashboard on gender gaps for the OECD countries (https://www.oecd.org/en/data/dashboards/gender-dashboard/comparison.html).

United Nations (UN). The UN has a statistics division (https://unstats.un.org/UNSDWebsite/) with a gender section (https://unstats.un.org/unsd/demographic-social/index.cshtml), as well as a subgroup, UNWomen (https://www.unwomen.org/en) with its own statistics site (http://unstats.un.org/unsd/demographic/).

United Nations Development Programme (UNDP). The UNDP (https://www.undp.org/) collects data yearly for the Human Development Report (https://hdr.undp.org/), the Human Development Index (https://hdr.undp.org/data-center/human-development-index#/indicies/HDI), and the associated Gender Development Index (https://hdr.undp.org/gender-development-index#/indicies/GDI) that are also available through its statistics site (https://hdr.undp.org/data-center). The UNDP has also developed the Gender Inequality Index (https://hdr.undp.org/data-center/thematic-composite-indices/gender-inequality-

index#/indicies/GII) and the Gender Social Norms Index (https://hdr.undp.org/content/2023-gender-social-norms-index-gsni#/indicies/GSNI).

United Nations Educational Scientific and Cultural Organization (UNESCO). UNESCO (https://www.unesco.org/en) has an institute for statistics with data on education and literacy related to gender in its database (https://uis.unesco.org/) and has a site on gender equality in education (https://uis.unesco.org/en/topic/gender-equality-education).

United States Central Intelligence Agency (CIA). The CIA has a useful world factbook site (https://www.cia.gov/the-world-factbook/) with country profiles including basic data separately by gender.

United States Department of Commerce, Bureau of the Census. The Census Bureau operates a useful international database of population estimates by gender and age for numerous countries (https://www.census.gov/data-tools/demo/idb/#/dashboard).

World Bank. The World Bank (https://www.worldbank.org/en/home) has a general data portal (https://data.worldbank.org/), a world development indicators site (https://databank.worldbank.org/source/world-development-indicators), and a gender data portal (https://genderdata.worldbank.org/en/home) and publishes yearly World Development Reports (https://www.worldbank.org/en/publication/wdr/wdr-archive) focusing on different topics of interest each year.

World Happiness Report. The World Happiness Report (https://worldhappiness.report/) is a partnership of Gallup, the Oxford Wellbeing Research Centre, the UN Sustainable Development Solutions Network, and an editorial board. It is published annually and has a general data portal (https://worldhappiness.report/data/).

World Health Organization (WHO). The United Nations' WHO (https://www.who.int/) has a general data portal (https://www.who.int/data) and a site for gender and health (https://www.who.int/health-topics/gender#tab=tab_1).

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How Do Older Adults Define a Good Death? A Scoping Review

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ABSTRACT

A scoping literature review of the concepts of "good death" and "dying well" among older adults was conducted. The purpose was to identify aspects that older adults specifically considered important in defining a good death. The search revealed five articles published between 2005 and 2019 that met inclusionary criteria for the review. Primary among the views of the older adults in these studies of a "good death" was the desire to avoid being a burden to families, done so by dying pain-free/peacefully (preferably in sleep), and preparing in advance by involving family in decisions and funeral/estate planning. Family support throughout the dying process was also seen as important. What constitutes a good death is unique to each individual, but knowing the conceptions of older adult cohorts, although not homogeneous, may guide discussions near the end of life.

KEY WORDS Good Death; Dying Well; Preparation for Death; Older Adults

According to the U.S. National Center for Health Statistics, the leading causes of death in the United States are heart disease, cancer, accidents, chronic lower respiratory diseases, and stroke (Kochanek, Xu, and Arias 2020). Four of these five diseases are chronic illnesses. Among the prevalent chronic illnesses are hypertension, high cholesterol, arthritis, coronary heart disease, diabetes, chronic kidney disease, and heart failure. Eighty percent of adults ages 65 and older have at least one, and 68% are diagnosed with two or more chronic illnesses (National Council on Aging n.d.). Chronic illnesses often affect the functional abilities of older adults; even if managed well, many cause complications or other health problems that may contribute to the leading causes of death. Along with managing often complex medical

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conditions, many older adults may contemplate the concept of a good death and wish to plan how to make their conception of a good death a reality.

Discussion of the concept of a good death can be found in the medical literature for many decades; however, it increased in the wake of the hospice and palliative care movement and intensified following the passage of the Patient Self-Determination Act of 1990. A good death is often described as unique to each individual (Hughes et al. 2008). The focus of discussion among health professionals was that an individual's wishes for a good death should be known and respected, particularly given that advancements in medicine often extended the dying process without improving quality of life. Different terms have been used to try to capture this concept of a good death, including *dying well*, *peaceful death*, *appropriate death*, *desired death*, and *dignified death* (Kehl 2006). According to the Institute of Medicine (IOM), a "decent" or "good" death is one that is "free from avoidable distress and suffering for patients, families, and caregivers; in general accord with patients' families' wishes; and reasonably consistent with clinical, cultural, and ethical standards" (Field and Cassel 1997:23). Despite past decades of advancements in end-of-life care and recognition of the need for improved communication between and among individuals, families, and health professionals, "still too often experienced is an extended dying course with limited attention to humanistic aspects of suffering" (IOM 2015); thus, individuals may not achieve what they consider to be a good death.

This scoping literature review examined the components and definition of a good death specifically among older adults based on research published in scholarly journals over a period of 15 years (2004–2019). The purpose was to identify aspects that older adults themselves considered important in defining a good death, by synthesizing the current state of research related to the older adult perspective.

LITERATURE REVIEW

Quality of life (QOL), particularly at the end of life, is considered a key factor in achieving a good death. Health-related quality of life focuses on the entire spectrum of health, including "physical, mental, social and role functioning; sense of well-being; freedom from bodily pain; satisfaction with health care; and an overall sense of general health" (Field and Cassel 1997:25). Freedom from pain is a frequent topic in the literature on a good death (Meier et al. 2016; Raisio, Vartiainen, and Jekunen 2015). Quality of dying is a similar concept to QOL and is defined as the convergence of preferred and experienced feelings and events just prior to death (Field and Cassel 1997; Wallston et al. 1988). For example, a positive quality of death occurs when the experience matches expectations. Each of these concepts can help professionals understand the best way to address concerns for people at or near the end of life.

Kehl (2006) reported that in a review of 42 articles (of all types) about the concept of a good death, strong agreement existed in the individuality of conceptions and that these may change over time depending on the individuals' experiences. The attributes of a good death most frequently found in the review included in samples revealing perspectives of health professionals and patients were being in control, being comfortable, sense of closure, affirmation/value of the dying person being recognized, trust in care providers, recognition

of impending death, beliefs and values honored, burden minimized, relationships optimized, appropriateness of death, leaving a legacy, and family care.

Meier and colleagues (2016) reviewed research using keywords with a broad lens (e.g., good death/dying; peaceful death/dying; attitudes/death; good death and end-of-life preferences) and with samples composed of health providers, family members (often bereaved) and adults of all ages. They noted similarities among the samples regarding some aspects of a good death that relate to being pain-free and to preferences for the dying process, but differences of perceived aspects of QOL were seen among the groups. For example, family members reported that QOL is a distinguishing feature of a good death more often than did patients and healthcare professionals. In comparison to healthcare providers, patients and family members also rated spirituality as an important contributor to a good death. In an Italian review study among samples of patients and health professionals, nine aspects were perceived to be important: symptom control, pain control, no overtreatment, respect of the patient's will regarding treatments, presence of loved ones, good communication with healthcare providers, a space for sharing emotions, respect of the patient's will regarding his/her death, and inner peace (Bovero et al. 2020).

No previous published scoping or other reviews have investigated the concept of a good death and its meaning specifically among older adults. Other reviews examined all ages, health statuses, and constituent groups (patients, families, healthcare providers), and most examined the results in aggregate or did little to differentiate or report responses separately among the different samples (Cottrell and Duggleby 2016; Meier et al. 2016). Additionally, much of the focus was on treatment preferences or advance directives, distinct concepts compared to the perception of a good death (Meier et al. 2016; Park et al. 2021; Raisio et al. 2016). For example, the dying process (e.g., time, location, and preparation for death) and being pain-free were the most frequent components of a good death according to Meier and colleagues (2016). The present scoping review intended to fill the gaps by examining what the literature reveals specifically about how older adults perceived or viewed a good death.

METHODS

This study used a systematic approach and followed the guidelines/checklist for scoping reviews presented in the Preferred Reporting Items for Systematic Reviews and Meta-Analyses statement (Tricco et al. 2018). A scoping review of the literature was conducted to identify the main concepts perceived as important in older adults' conception of a good death. The researchers sought to uncover the extent and range of research conducted specific to older adults' views of a good death, as well as the gaps in the research regarding older adults' views. These purposes indicated that the best type of review to undertake was a scoping review (Daudt, van Mossel, and Scott 2013).

The terms *older adults*, *elderly*, and *seniors* were used rather than a specific age limiter during the search process to capture more potential manuscripts for review. The specific search string was "('Good Death' OR 'Dying Well') AND (older adults OR elderly OR seniors OR geriatrics OR gerontology)" and was implemented to review available literature in these databases: Abstracts in Social Gerontology, Academic Search Premier,

CINAHL Plus, PsychInfo, and PubMed. Because of the growing importance and public discourse of concepts of patient autonomy and death with dignity of one's own choosing, the search strategy limited results to peer-reviewed records published between January 2004 and the search date in December 2019. Earlier literature would likely not reflect the current public viewpoint based on the more recent advances in medicine and conceptions of dying well. After the literature search, 511 total citations (Abstracts in Social Gerontology, 27; Academic Search Premier, 109; CINAHL Plus, 49; PsychInfo, 71; PubMed, 255) were located. Duplicates were removed using the "find duplicates" function in EndNote and manual screening of the citations, resulting in a sample of 344 citations for the title and abstract screening phase of the study. Figure 1 provides a flow diagram of the selection process for the present study.

Title and abstract screening was supported by Rayyan, a web-based systematic review program (Ouzzani et al. 2016). A separate Rayyan review was created during the title and abstract review stage, the full-text screening stage, and the full-text review stage. This was done to facilitate organization and streamline the scoping review process. Records were extracted from the databases and manually searched for duplicates. The final list of records for review was uploaded to Rayyan, and a second duplicate search was conducted. Using the final sample of records, record titles and abstracts were independently screened by the researchers for inclusionary criteria, including a specific focus on older adults, the conception of a good death according to older adults, and the research having been conducted in the United States. No limits were placed on the type of research (i.e., qualitative, quantitative, or mixed methods). Specifically excluded were articles that pertained to treatment preferences, advance directives, advance care planning, and studies not exclusive to older adults. A consensus meeting between the researchers was held to discuss any disagreements related to the inclusion or exclusion of specific citations. During the title and abstract review phase, the researchers looked for specific mentions of participants being aged 65 and older. When there was doubt regarding the age of the sample, during the consensus meeting, the full manuscript was reviewed for specific mention of participant age. Initially, 322 citations were excluded, resulting in a sample of 22 articles for full-text screening. After the initial full-text screening phase and to ensure inclusivity of the scoping review, 120 studies originally excluded because the samples comprised individuals outside of the United States were rescreened to include countries considered Westernized (North America, Europe, United Kingdom, and Australia) while meeting all other study criteria. This decision was made based on the potential similarities of countries considered Western when compared to non-Western countries (Moss 2020; Cottrell and Duggleby 2016). There were, however, a significant number of records that examined the concept of a good death from a non-Western perspective and were excluded. In the review, the goal was to search for commonalities in the views of older adults, and because these countries are likely culturally different in their views of medical care and societal views of death, we chose to exclude them. Our use of the term *Western* or *Westernized* has long been used to describe a grouping of countries that share cultural values and behaviors (Cottrell and Duggleby 2016). According to Moss (2020), people of Eastern culture are more likely to be in groups and make decisions by consulting and sharing decisions with others, while people of Western culture are individualistic,

autonomous, and make decisions on their own. Further, "Eastern culture respects the elders and takes care of them in old age, whereas Western culture does not give much importance to their elders as they usually live in old homes" (Moss 2020:para. 3).

Figure 1. Flow Diagram of Study Selection Process
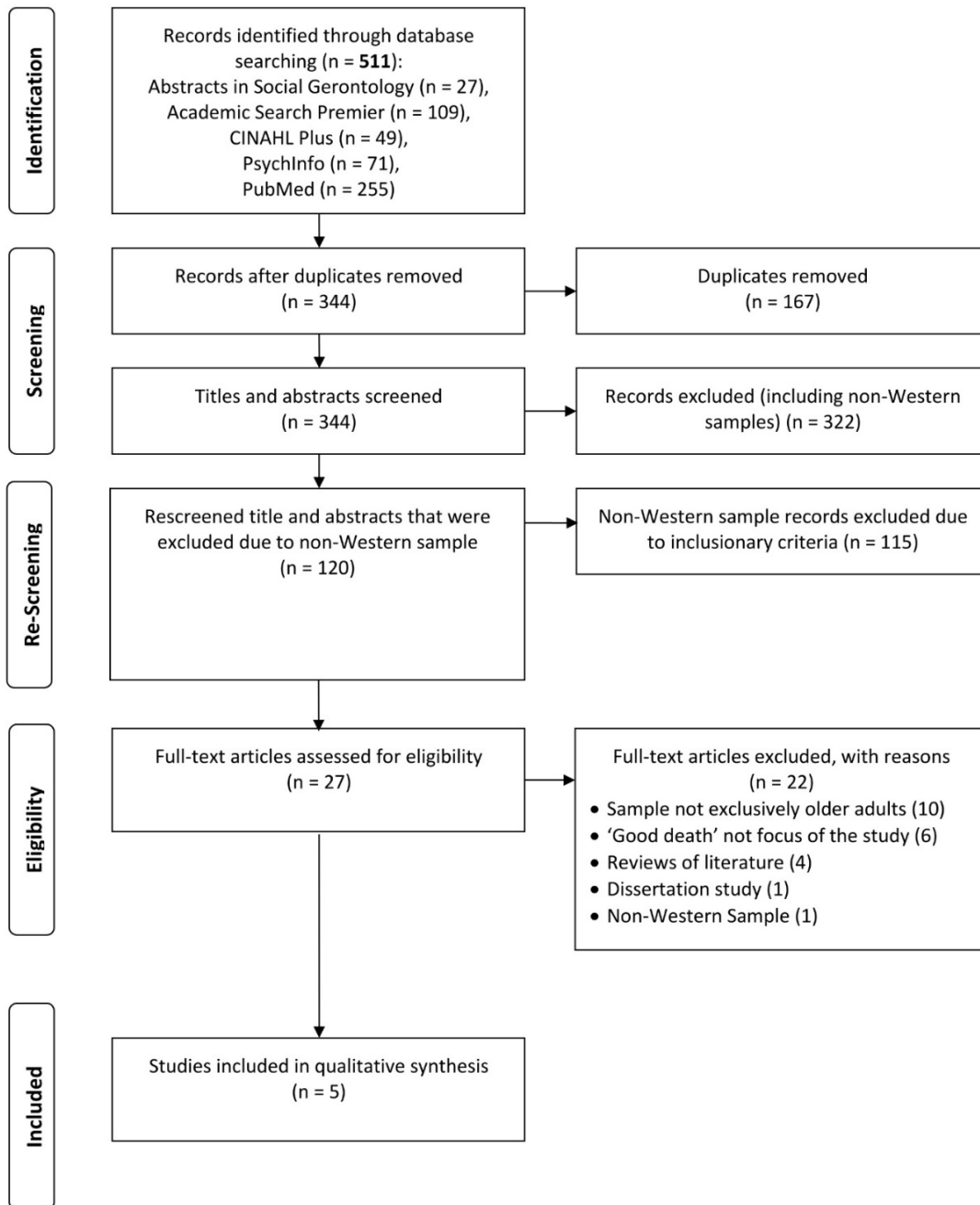
Five additional records of the 120 rescreened because of sample location met the criteria for full-text screening. Following the full-text review of 27 articles, 22 articles were excluded: 10 because the sample was not exclusively older adults, 6 because a good death was not the focus of the study, 4 because they were reviews of the literature, 1 because it was a dissertation study, and 1 because it included a non-Western sample. Through discussion and consensus, a final sample of five articles remained for qualitative synthesis. The two researchers independently reread the full text of each of the 5 articles to identify common themes. These are reported below in the findings and highlighted in detail for each of the 5 articles.

FINDINGS

The five articles eligible for full-text review were published between the years of 2004 and 2015. The studies reviewed included Gott et al. (2008); Hattori and Ishida (2012); Ko et al. (2013); Ko, Kwak, and Nelson-Becker (2015); and Vig and Pearlman (2004). Four of the studies were conducted in the United States, and one in the United Kingdom. All had a similar purpose of identifying perceptions/conceptions of a good death. All studies were qualitative, involving direct interviews with the participants. The average ages of participants in the studies ranged from 65 to 78. Two of the studies sampled healthy/active older adults to understand their beliefs about death, and these samples were also focused on nondominant cultural groups (Japanese American, Mexican American). One study sampled a disenfranchised group (homeless men), and two included only samples of seriously or terminally ill men diagnosed with heart disease or cancer (see Table 1). All studies mention a "pain-free" death, open acknowledgment of death, death at home, and various aspects of preparation for death (see Table 2). This section gives a more detailed description of each article to further discern the gaps in the literature and nuances in the studies found regarding older adults' views of a good death. This is followed by a collated examination in the discussion section.

Gott et al. (2008)

This study was conducted with a subsample of participants who participated in a larger quantitative study with the overall aim of exploring the palliative-care needs of older adults who were diagnosed with heart failure. Participants were recruited through 16 general medicine practices in two urban and two rural locations areas in the United Kingdom. The study sample included 40 people (21 men, 19 women) with advanced heart disease and poor prognosis. The average age was 77. Individual interviews were conducted in the participants' homes using a semistructured format. The authors organized their study according to a "revivalist" view of palliative care (Reuben, Mor, and Hiris 1988). Elements included open acknowledgment of the imminence of dying, death at home, an aware death, dying as an opportunity for personal growth, and death according to personal preferences/individuality. The researchers wanted to know if the espoused components of palliative care resonated with older adults with serious illness. Most participants were concerned with having a "pain-free" death, and some mentioned a death without

breathlessness. Few participants expressed that open acknowledgment of dying/prognosis was important, but those who did identified the ability to take care of practical things and get "their affairs in order" as the reason for their preference.

Table 1. Description of Included Studies

Study Authors, Year, Country	Study Purpose	Methodology	Sample	Measure(s)
Gott et al. (2008) U.K.	Explore thoughts about, and concerns for, their future related to dying and death	–Qualitative –Individual face-to-face interviews	40 older adults aged 60+ with advanced heart failure/poor prognosis	Semistructured interview guide
Hattori and Ishida (2012) U.S.	Understand a good death among the elderly Japanese Americans in Hawaii	Qualitative ethnography	–18 (4 men, 14 women) older Japanese-Americans in Hawaii –Healthy/active –Average age 78	–Unstructured –One question: "What does good death mean to you?"
Ko et al. (2013) U.S.	Learn older Mexican Americans' perceptions of a good death	–Qualitative –In-depth face-to-face interviews	–18 older Mexican Americans (Southern California) self-identified as of Mexican descent –Average age 77.5	Semistructured interview guide (3 specific questions asked with follow-up probes)
Ko et al. (2015) U.S.	Explore older homeless adults' perspectives toward good and bad deaths and their concerns regarding EOL care needs	–Qualitative –In-depth face-to-face interviews	–21 older homeless adults (60+) at a transitional housing facility in San Diego –"Relatively healthy" –Average age 65	Semistructured interview guide

Table 1. Description of Included Studies, concl.

Study Authors, Year, Country	Study Purpose	Methodology	Sample	Measure(s)
Vig and Pearlman (2004) U.S.	Understand how terminally ill men conceptualize good and bad dying experiences	Mixed methods: qualitative face-to-face interviews with semistructured guide/open-ended questions; case scenarios with closed-ended responses	–26 terminally ill older men (heart disease or cancer) –Average age 71	Semistructured interviews: open-ended and scenarios/closed-ended responses

Note: EOL=end of life; U.K.=United Kingdom; U.S.=United States.

Views varied about the place of death. Participants wishing a death at home linked this preference most often to sudden (and unaware) death in their own beds. A sudden death was preferred most in order to avoid becoming dependent and possibly burdening the family with their care. Additionally, many did not prefer an anticipated death at home because they preferred a sudden death, rather than anticipated. Linking the study findings to the "revivalist" (and prevailing) view of palliative care led these researchers to note that many of the aspects of the philosophical view of palliative care may not resonate with the cohort of older adults. In addition, recognition of other cultural factors that influence attitudes about what constitutes a good death may also be important.

Hattori and Ishida (2012)

The aim of this focused ethnographic study was to explore the "understanding" of a good death among older Japanese Americans within their cultural group in the Japanese American community in Honolulu, Hawaii. Eighteen "healthy and active" older Japanese Americans, who were not involved in home health care, were the target sample and were recruited from several community organizations and gathering points (e.g., senior center, teahouse, church/temple). Four men and 14 women were interviewed, with an average age of 78. Four community leaders were also interviewed, but the focus of the findings was primarily the views of the older adults. Also used were supplementary data sources and field notes. Several recruitment strategies were employed, including posters, presentations at community gatherings, and snowball sampling. Interviews were held in a variety of locations that were mutually agreed upon by the participants. Six interviews were conducted in Japanese language and back-translation was used. One open-ended question

was asked: "What does good death mean to you?" The findings and discussion were focused on the main theme found: "not being a burden" to family, especially to the family members who were also of an older age. Other themes were the process of life and death, individual views on death, and Japanese culture in Hawaii. There were four aspects of "not being a burden": preparations, family support, friend support, and finance. Preparations made by more than half of the participants were purchasing long-term care insurance and preparing for death through living wills and living trusts. They felt relief by being able to spare their families from decision-making for the dying family member. All participants stated that they did not want resuscitation if they were terminally ill. They discussed the importance of family support in terms of expectations from parents and other family members, particularly children. Gender roles predominated in discussions regarding family and social support. The older adults looked to the support of friends (women only) for help with positive attitudes in older age, for checks on each other, to be good role models, and for emotional support for themselves and their children. Financial aspects were also seen as important and could include reallocating resources appropriate to anticipated needs in older age. For these older Japanese Americans, a good death was believed to result from good advance preparation (not causing emotional or financial stress for the family), and this conception was also very individualized. The belief was that a good death was closely associated with the quality of life.

Ko et al. (2013)

A qualitative methodology was used in this study to explore Mexican American older adults' conceptions of good and bad deaths and their beliefs about it according to their Mexican and Mexican American cultural groups. The sample was drawn from a larger study of 64 Korean and 58 Mexican Americans regarding advance care planning. Participants were recruited from community sites where older adults gathered for enrichment activities. Eligibility requirements were being aged 60 years or older, self-identifying as being of Mexican descent, and being a member or resident of either of two community senior centers or a senior housing facility. The study was announced at the recruitment sites, and flyers were posted. Potential voluntary participants completed a sign-up sheet and were later screened by researchers to ensure adequate cognitive ability to complete the study. After the quantitative portion, 18 participants who indicated an interest in participating in a further interview comprised the sample for the study. The aim was to explore elements of a good death. The average age of participants was 77.5 years, educational attainment was 8.4 years, and 94% rated their physical health as excellent, very good, or good. A semistructured interview guide with open-ended questions was used. Three specific questions were asked: How would you describe a good death? How would you describe a bad death? What are your concerns about death?

Half of the participants spoke in Spanish, and these interviews were translated verbatim for analysis. An inductive grounded theory data analysis methodology was used. Five dominant themes were found: not suffering, living life with faith, having time for closure with family, dying at home, and a natural death. Most participants believed that a good death was dying without suffering, quickly in their sleep. Dying with pain over a long

period of time and causing suffering for the family were described as constituting a bad death. Religiosity/spirituality was seen as an important aspect contributing to a good death. More than half of the participants believed that God decides how and when someone dies and that death should be accepted as God's calling. Some viewed death as an opportunity to meet God and that how someone lived their life determined whether they had a good death or a bad death. Death was considered part of life, and it was important to have a peaceful dying with family. Being with family was a crucial aspect, and participants believed that family should be closely involved in final decisions. They also wanted closure or a chance to say goodbye. Dying at home was seen as a peaceful death. A natural death was characterized as without reliance on medicine/medical technology and as part of the life course. The authors drew a broad conclusion that these individuals' perceptions/beliefs about a good death were influenced by individual, social, cultural, and spiritual values.

Ko et al. (2015)

The aim of this study was to explore the perspectives of a good and bad death among homeless older adults. The sample for this qualitative study was recruited from one transitional housing facility in San Diego. The facility housed older adults over the age of 60 for a maximum of three months while they awaited permanent housing arrangements. Case managers placed letters on the doors of residents who were age 60 or older and then directed interested participants to contact the researchers. Of 36 residents, a total of 21 individuals (18 men, 3 women) were screened for cognitive ability and completed face-to-face interviews with the researcher. The average age was 65. More than half rated their health to be good or very good, with 19% reporting poor health. In addition, 61% reported that they had been admitted to an intensive care unit. A semistructured interview guide was used with these questions: How would you describe a good death and a bad death? What would be the ideal or best situation in which you envision yourself dying? What do you think may stand in the way of you having a good death you described?

The audio recordings were transcribed, and then transcripts were analyzed utilizing a grounded theory constant comparative method. Themes found for a good death were dying peacefully, not suffering, experiencing spiritual connection, and making amends with significant others. Themes for a bad death were experiencing death by accident or violence, prolonging life with life supports, becoming dependent while entering a dying trajectory, and dying alone. Participants believed that dying in their sleep was ideal and would be considered a peaceful death. A fear noted was that participants might suffer physical pain due to a disease or accident. The presence of God or a higher power during the dying process was seen by many as important and equated with not being alone. Participants believed that resolving internal conflicts and making amends with family and friends was needed to have a sense of closure and to allow for acceptance of death.

Few studies have been conducted that examined end-of-life perceptions among the marginalized older homeless population. This study illuminated some unique aspects of conceptions of a good or bad death that are important and should be further explored by healthcare professionals treating older homeless adults.

Vig and Pearlman (2004)

The goal of this study was to uncover how both a good death and a bad death were conceptualized among terminally ill men, and to identify aspects important for the quality of the end of life. The authors used a qualitative research design that included individual interviews with terminally ill older men (average age 71). Physicians from a variety of practice settings (geriatric, general internal medicine, cardiology, and oncology clinics) identified men with a prognosis of less than six months evidenced by a Karnofsky scale measure of S50 or less (Reuben et al. 1988). Potential participants received a letter regarding the study from the physician followed by calls from the researchers to ask if they were willing to participate. Forty-one were originally recruited, 33 were eligible, and 26 agreed to participate. The participants had either a cancer or heart disease diagnosis.

Table 2. Overview of Study Themes

Pain-free death (5)
Not suffering
No physical pain
Peaceful death (3)
Dying in sleep
Open acknowledgment of the imminence of death (5)
Want to know—can plan
An "aware" death (3)
Having time to get affairs in order, such as planning a funeral–thought of as helpful to family
Allowing for closure with family/reconciliations or making amends
Don't want to know—not thinking about dying allows you to "enjoy the present"
Death at home (5)
Not in hospital, free of invasive medical procedures
Linked to sudden death (which would occur at home)
Natural death
Preparation (5)
Not being a burden to family
Family support
Friends' support
Finances
Family involved in final decisions
Religious or spiritual connection (2)
Living with faith—relationship with God or higher power
Accepting death is "natural response to God's calling"

A semistructured interview guide containing open-ended questions was used, as well as case scenarios with closed-ended responses. Components of a good death and a bad death were identified and described separately from the participants' dialogue and responses to case scenarios. Responses among the men were heterogeneous; not all indicated any one element. Regarding a good death, more than half reported that a good death would be "in my sleep," quick, peaceful, and painless. Other factors identified for a good death were without suffering, being at peace with God, and without knowledge of impending death. The case scenarios asked for a rating of other end-of-life issues. The most important of these were family/friends in current life, but the presence of family/friends and physical contact with loved ones at the very end of life was less important. Religion/spirituality in current life was also thought by more than half of the participants to be very important.

Conclusions drawn were that what defines a good or bad death is individual to each person. Fittingly, the components that constituted a bad death are largely the opposite of a good death. A bad death was painful and prolonged, and many participants also believed that becoming dependent on artificial treatments and suffering would constitute a bad death. Physicians should specifically ask patients about what a good death is to them, including the specific meanings of aspects such as suffering and the importance of family/friends near the end of life. The study authors concluded that having these conversations could lead to improved QOL at the end of life.

DISCUSSION

The surprise finding of this study was that only five studies were identified with a specific focus on older adults' views/perceptions of a good death. Many of the studies found in the initial literature search examined samples that included adults of all ages or a mix of adults, older adults, family members/caregivers, and/or healthcare providers of all types (i.e., physicians, nurses, social workers, chaplains) and the findings were presented in such a way that it was impossible to extract preferences of older adults.

Two themes were most dominant in the studies of older adults: pain and preparation for death, identified through consensus agreement between the researchers after an independent review of findings. The prevailing perception found among the studies was that it is desirable to have a pain-free/peaceful death, ideally at home, in one's sleep. This finding is supported by many studies attempting to define a good death (Bosek et al. 2003; Steinhauser et al. 2000, 2001; Vig, Davenport, and Pearlman 2002). A pain-free or peaceful death was a dominant aspect found by Meier and colleagues (2016) among samples of adults/patients, family members, and healthcare providers. In the context of pain, most also mentioned that not suffering was important, although this concept was not well defined. Suffering as a concept depends greatly on individual perceptions. Symptoms other than pain and suffering were not often mentioned.

Preparation for death was multifaceted and mentioned in all the studies in various ways/perspectives. It took the form of discussion of wishes for care near the end of life, closure with family and "making amends," and in even more concrete ways, such as funeral and estate preplanning and ensuring future financial security for the

surviving family. Although some did not want to know about impending death, those who did want to know discussed that it was so they could prepare, in order to be less of a burden on family. This time for preparation is seen throughout the literature of surviving family and friends, as many view this time as an opportunity for closure and to reach acceptance of both the dying person and the survivor (Steinhauser et al. 2000).

What is evident from the predominant views of the samples of older adults in the reviewed studies is that psychosocial and spiritual, rather than medical, aspects were of most concern in an effort to have a good death. Having "peace" with God and a spiritual connection was noted as important by the Hispanic Americans and the homeless men. The religious and spiritual aspects of a good death were not specifically explored in any of the studies but were viewed as part of the concept. Religiosity and spirituality can help older adults manage difficult life events, such as serious illness, as they age or as they experience the deaths of close friends and family (Nelson-Becker, Canda, and Nakashima 2015). Healthcare providers and nonelderly populations also note the importance of religious or spiritual support while individuals approach the end of life (Bratcher 2010; Braun and Zir 2001; Pierson, Curtis, and Patrick 2002). Individuals may become more religious/spiritual in their outlook as they near the end of life, emphasizing the need to address spiritual needs before and during the dying process.

An overlapping subtheme of both pain and preparation for death was "being a burden," which also was considered psychosocial in nature. Participants commonly identified this as the reason for wanting to die at home in their sleep/peacefully. Although in a couple of the reviewed studies, a fear of physical pain was mentioned, most hoped that family would not have to be burdened by seeing them in pain or discomfort and by needing to provide physical care. In one study, participants mentioned that they preferred not to be at home during the dying process because of the burden it would cause for their families. Preparation for death meant that family members would know what to expect medically/physically and would not be "burdened" with not knowing what the individual desired for treatment near the end of life. Family members were to be involved in discussions about medical care/treatment in advance of terminal illness so the decision-making burden would not be placed on the family when the patient was unable to make decisions for themselves. Particularly in Hattori and Ishida (2012), participants wanted to also know that the family was "taken care of" financially; this could be possible if there was advance notice that death was imminent and there was time for preparation.

As in the study by Meier and colleagues (2016), in these articles, the length of time between the interview or survey and the participants' deaths for those with samples of seriously ill individuals was not given. This is often important, as perceptions of what constitutes a good death or dying well may change over time in response to advancing illness or influential experiences such as the death of a close family member. Also seen in the reviewed studies was that, among the "healthy" older adult samples, there seemed to be a greater likelihood to focus on nonphysical symptoms and existential aspects (such as making amends and having closure with family).

LIMITATIONS, STRENGTHS, AND FUTURE RESEARCH

Limitations of this study include that the search was confined to the previous 15 years and used few search terms ("good death," "dying well"). The specific focus was on older adults; therefore, much of the literature was excluded, in which the samples may have included older adults but also other populations such as family members, clergy, or healthcare providers. Because of the design and reporting of these other studies, parsing out the older adult preferences was not possible. Many of the excluded studies focused on medical treatment preferences for a "good" death, according to one's wishes, which was conceptually different in nature than the study's aims. In addition, a more holistic conception with a focus on psychosocial aspects of a good death could be explored by excluding studies likely to focus only on medical aspects. Although the present study design provides for limited generalizability, the findings lay important groundwork for future research on the conception of a good death among older adults.

One strength of this study was this focus, as well as the limit of the samples to older adults. Large-scale studies should either exclusively sample older adults (also expanded age range), or, if part of a larger diverse sample, analysis should separate the views of the various subsamples in the studies. Large-scale studies will likely need to be quantitative in nature, however, also requiring further qualitative exploration of the psychosocial and spiritual components of a good death according to older adults. Finally, studies that focus on older women would also be valuable, as the current literature on the topic remains fairly gender-neutral.

Admittedly, the focus only on countries whose cultures are considered to hold a Western viewpoint of medicine was another limitation. As we continually trend toward becoming one global society, examining differing perspectives is also needed. As may be somewhat unique in scope in the United States, two of the studies found included diverse non-Western culture participants who, however, were living in the United States. No information was given about the length of time living in the country or assimilation of the older adults in these two studies. Their views may not have been similar to those in the other three studies in which the participants were of Western culture but instead may have been possibly a mix of the two cultures; thus, results should be viewed with caution. Another limitation was narrowly focusing on chronological age in the study, which does not acknowledge the heterogeneity of older adults that exists.

The reviewed studies overall had wide diversity and specificity of sample populations: older homeless men, Japanese Americans, Hispanic Americans, terminally ill men, and adults diagnosed with heart failure. Further research is needed to focus on the perceptions of a good death for groups of older adults of different cultural backgrounds, social circumstances, and serious diagnoses. Ideally, convergence of these three areas should occur in the samples: for example, low-income African American older adults diagnosed with diabetes. Studies that focus exclusively on older women are warranted, given the greater likelihood of women's longevity and of outliving their partners, as well as greater functional disability due to chronic illness. Additionally, men and women often have very different experiences with the healthcare system, and as caregivers, that would likely influence their views of what constitutes a good death.

CONCLUSIONS

For older adults, it is inevitable to have experienced multiple losses due to the death of family members and friends that could consciously or unconsciously lead to thoughts of their own deaths and formulations of how they themselves would want to die. Because they have had such experiences, their perceptions may differ from those of younger adults who haven't experienced many deaths (Kehl 2006). Additionally, more recently, a consequence of the millions of deaths experienced worldwide due to the COVID-19 pandemic may be a renewed call for people of all ages to consider what makes a death a good death.

However, it continues to be imperative that older adults' conceptions of a good death be discussed among and with families and healthcare providers and that they include more in the conversation than medical treatment preferences. Older adults will want to prepare for impending death to ensure, as much as possible, that they do not become burdens to their families. Looking toward positive aspects of dying would allow individuals the permission to explore continued meaning and connection and to plan for the well-being of important others near the end of life.

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The Effect of Stimulus Payments on College Students: Ex-ante Perceptions and Reality

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ABSTRACT

In this paper, we use a natural experiment to measure the impact of a transitory positive income shock on college education. On March 11, 2021, the American Rescue Plan Act was signed into law. This act made provisions for the third round of Economic Impact Payment for eligible U.S. residents. Each person in an eligible family received up to $1,400. This stimulus payment was an exogenous positive income shock on U.S. college students if they received the payment. Using primary data collected through a survey, we first investigate how U.S. college students were affected by and responded to this income shock. More specifically, we investigate how much stimulus money ultimately reached the hands of college students and the effect of this income shock on their investments in education, credit hours enrolled, and time to graduate. Only 38% of students received stimulus payments at their disposal, and 59% of the stimulus money they received was spent on their education. Among those who received stimulus money, 20.4% reported that it helped them to enroll in more credit hours, while 19.8% thought that it helped them to graduate early. The ex-ante perceptions of those who did not receive stimulus money about the expected benefits on their education were stronger than the ex-post perceptions of those who received money.

Education plays a pivotal role in shaping future income opportunities. Based on the current population survey data for 2021, a bachelor's degree holder earns 65% over a high school diploma holder, which translates to additional lifetime earnings of around 1.1 million in 2021 dollars over the course of a 40-year career (U.S. Bureau of Labor Statistics 2022). Though the rewards more than compensate for the cost, the cost of attending college continues to increase each year. According to the College Board, in 2022–2023, the average estimated annual cost for attending college ranged from $27,940 for a public four-year in-state student to $57,550 for a private four-year nonprofit student (Ma and Pender 2022). This included tuition and fees, room and board, books and other supplies, transportation, and other personal expenses. During the 30 years from 1992–1993 to 2022–2023, average published tuition and fees at public four-year universities have increased from $4,870 to $10,940. In August 2022, announcing the decision of the U.S. government to provide student loan relief up to $20,000, President Biden referred to this increase in the cost of attending college in the United States and the need to pay attention to the issue if the United States needs to avoid being outcompeted by rest of the world in education (White House 2022).

Approximately two of every three students in the United States who graduate from high school enroll in colleges or universities (U.S. Bureau of Labor Statistics 2020); however, the income education gap remains a policy concern. Only a third of full-time four-year college students participated in the labor force in October 2019, indicating that the education expenses of at least two-thirds of students are exclusively covered by other means. Most of the education-related expenses of U.S. college students are covered by various subsidies and student loans. In 2021–2022, an undergraduate student received an average of $15,330 in financial aid, which included grants (69%), federal loans (24%), education tax credits and deductions (6%), and Federal Work-Study (Ma and Pender 2022). Although various federal and nonfederal initiatives have helped to close the income education gap, increases in college enrollments among families of lowsocioeconomic status (SES) are absorbed mostly by two-year colleges, not four-year colleges, indicating the burden of the increased cost, among other factors.[1]

The lifetime income premium of earning a college degree keeps increasing while the cost of attending college continues to increase and disparities in investments in education remain high. These three factors have popularized the idea among the mayors and governors affiliated with both parties that a publicly funded K–12 education is no longer sufficient, and several U.S. states and cities have recently taken measures to expand public education beyond K–12. While federal and other policies determine the supply of investments in education, various behavioral factors determine the demand side. How an increase in household income translates to investments in education by household members in college is a matter of household financial management and household resource allocation. In this paper, we use a natural experiment to measure the impact of a transitory positive income shock on college education.

On March 11, 2021, the American Rescue Plan Act was signed into law. This act made provisions for the third round of Economic Impact Payment for U.S. residents who earned less than $80,000 in 2020 and for couples who filed their taxes jointly and earned less than $160,000. The single tax filers who earned less than $75,000 and the joint filers

who earned less than $150,000 received $1,400 per person as a direct payment while other eligible individuals received less on a prorated basis. Tax filers also received an additional $1,400 per dependent. This stimulus payment was an exogenous shock on most individuals, including U.S. college students. We first investigate and report how U.S. college students were affected by and responded to this income shock.

As the first objective of this research, we estimate the effect of an income shock in the form of a general economic stimulus payment on investments in education, reflected by the amount allocated for education-related expenses. We also estimate the self-reported impact on the number of credit hours enrolled and the time to graduate. In addition, we compare these revealed preferences with their ex-ante perceptions indirectly by using as a control group those who were not able to receive and/or spend at their discretion this stimulus payment and comparing with their perceptions about the potential effect of this stimulus payment.

MATERIAL AND METHODS

This study is based on primary data collected from a random sample of students enrolled in an undergraduate degree program at an urban university in the U.S. Midwest through a Qualtrics survey during June 2021. The Survey Committee of the Institutional Research and Decision Support of the university provided the e-mail addresses of a random sample of 8,000 students who were enrolled in courses seeking an undergraduate degree in January 2021. After approval was obtained from the institutional review board, these students were contacted via e-mail on June 15, 2021, and invited to participate in a Qualtrics survey, but 451 e-mails bounced and did not reach the recipients. Two reminders were sent to those who did not complete the survey during the subsequent weeks, and the survey was closed on July 10, 2021. The relevant part of the survey questionnaire is available in Appendix A.

Of the 7,549 recipients who received the invitation, 1,344 students completed the survey, a response rate of 17.8%. Data was analyzed using Stata MP version 17.0 after deidentification. The survey respondents were allowed to skip any of the questions they did not want to answer, and as a result, many responses were incomplete. The two most important questions, whether the recipient received the stimulus payment and whether the recipient was able to decide how to spend this transfer payment, were answered by 1,164 respondents. Using those observations, we first compared the characteristics of recipients and nonrecipients. We used descriptive statistics to analyze the heterogenous effects of this income shock on education outcomes of various demographic groups. Then we used a probit model to compare the impact of this stimulus payment on various education-related outcomes of recipients to the perceived benefits of nonrecipients if they could receive this payment. This control group was used as a proxy to measure the ex-ante perceptions of the recipients with their ex-post perceptions. Finally, we used a Heckman selection model to investigate the factors affecting the amount and the share spent on education by recipients after receiving this stimulus payment.

RESULTS

Thirty-eight percent of students (442) received and decided how to spend stimulus money. Others were either not eligible for the payment or were dependents of their parents or caregivers and did not have the chance to decide how to spend this money. Some students were unhappy about not receiving stimulus money at their disposal. For example, one student wrote, "I am a 'dependent' of my mom, despite her paying for none of my schooling or necessities." Table 1 compares the characteristics of the students who received stimulus money at their disposal with the characteristics of those who did not; the *t*-statistics presented compare the means of variables across the two groups. Stimulus-payment recipients were more likely to be African American, were less likely to be Asian, and were older than nonrecipients. They were more likely to be in an advanced class standing, have relatively low GPA, and have student debt than were nonrecipients. The two groups were not different in terms of gender composition or Hispanic origin.

Table 1. Comparison of Stimulus Payment Recipients and Nonrecipients

	Recipients	**Nonrecipients**	***t*-statistics**
Full sample	442 (38.0%)	722 (62.0%)	
Gender			
Male	157 (36.18%)	266 (37.78%)	0.5451
Female	269 (61.98%)	419 (59.52%)	−0.8254
Nonbinary	6 (1.38%)	11 (1.56%)	0.2429
Race			
White	269 (62.12%)	453 (64.62%)	0.8490
Black	72 (16.63%)	62 (8.84%)	−3.9688***
Asian	36 (8.31%)	94 (13.41%)	2.6223**
Other/Mixed	56 (12.93%)	92 (13.12%)	0.0927
Hispanic origin			
Hispanic	53 (12.24%)	70 (9.97%)	1.1941
Non-Hispanic	380 (87.76%)	632 (90.03%)	−1.1941
Class standing			
Freshman	47 (10.90%)	149 (21.26%)	4.5050***
Sophomore	99 (22.97%)	170 (24.25%)	0.4914
Junior	144 (33.41%)	224 (31.95%)	−0.5075
Senior	141 (32.71%)	158 (22.54%)	−3.7912***
Nationality			
Domestic	429 (99.08%)	644 (92.40%)	−5.0397***
International	4 (0.92%)	53 (7.60%)	5.0397***

Table 1. Comparison of Stimulus Payment Recipients and Nonrecipients, concl.

	Recipients	Nonrecipients	*t*-statistics
GPA			
0.0–2.0	14 (3.25%)	15 (2.15%)	–1.1339
2.0–2.5	32 (7.42%)	35 (5.01%)	–1.6658*
2.5–3.0	81 (18.79%)	108 (15.47%)	–1.4520
3.0–3.5	128 (29.70%)	214 (30.66%)	0.3410
3.5–4.0	176 (40.84%)	326 (46.70%)	1.9296*
Age			
18–19	42 (9.84%)	187 (26.98%)	7.0571***
20–21	133 (31.15%)	321 (46.32%)	5.0763***
22–23	86 (20.14%)	136 (19.62%)	–0.2101
24–62	166 (38.87%)	49 (7.07%)	–14.2570***
Student debt			
Yes	246 (57.48%)	273 (40.15%)	–5.7056***
No	182 (42.52%)	407 (59.85%)	5.7056***
Average bank balance			
<$500	89 (21.09%)	139 (20.75%)	–0.1360
$500–1000	101 (23.93%)	153 (22.84%)	–0.4178
$1000–2000	63 (14.93%)	137 (20.45%)	2.2994**
>$2000	169 (40.05%)	241 (35.97%)	–1.3547

*$p < .1$ **$p < .05$ ***$p < .01$

The effect of stimulus payments on recipients, as reported by them, is summarized in Table 2. Among the recipients, 84.4% received exactly $1400, 7.8% received more, and another 7.8% received less. The average amount received by recipients was $1544. On average, a student spent $847 on their education, which represented 59.1% of stimulus payment received.[2] In other words, the share of transitory income invested in education for the entire sample with complete information about the stimulus payment received and the amount spent on education (N = 326) was 0.591. Demonstrating the heterogeneity in preferences, 23.6% of recipients spent none on education, while 38.3% spent the entire amount on their education. Others spent a part of this transfer payment on their education. Asians, on average, spent more on their education than all other racial categories though they received less as stimulus money. African American students received and spent more than White students. Hispanics received and spent more than non-Hispanics. Sophomores and juniors were more likely to spend on education than were freshmen and seniors, perhaps indicating the differential marginal benefits as they are in a hurry to complete their degrees compared to freshmen, while seniors have already made the most of their education investments with less room to expediate their planned schedules. We see a similar concave pattern also with education investments and GPA, possibly indicating that students with both low and high GPAs are less motivated to allocate their money for education because

their expected benefit for an additional invested dollar is less, albeit for different reasons. Students with low GPA may not value education as much as others. Students with high GPA, in comparison, may value their education highly, but because they have already invested a higher amount in education, the marginal gain is probably not very high, as they perceive it.[3] Education investments were positively correlated with having student debt and a lower bank balance, clearly indicating that the stimulus payments have benefitted credit-constrained students more than the others.

Table 2. The Effect of Stimulus Payment on Education

	Amount Received ($)	Amount Spent on Education ($)	Percentage Spent on Education (%)	Helped to Enroll in More Credit Hours (%)	Helped to Graduate Early (%)
Full sample	1544.15	847.06	59.1	20.4	19.8
Gender					
Male	1504.75	801.57	60.7	20.0	22.9
Female	1563.06	871.56	57.5	20.9	18.2
Nonbinary	1300.00	740.00	50.6	21.4	16.7
Race					
White	1520.99	789.27	53.9	15.5	13.7
Black	1596.92	969.23	63.7	30.9	35.6
Asian	1382.35	1082.64	85.3	42.2	32.4
Other/Mixed	1684.09	788.60	52.6	18.5	24.6
Hispanic origin					
Hispanic	1731.82	906.72	55.2	25.8	22.2
Non-Hispanic	1516.81	837.09	59.6	19.5	19.5
Class standing					
Freshman	1369.77	659.48	45.5	20.7	26.0
Sophomore	1524.77	1001.21	66.3	27.3	25.5
Junior	1495.58	907.17	65.2	22.6	18.4
Senior	1621.43	748.99	51.8	14.5	16.0
Nationality					
Domestic	1545.41	847.28	59.1	19.9	19.8
International	1400.00	816.67	58.3	75.0	25.0

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Table 2. The Effect of Stimulus Payment on Education, concl.

	Amount Received ($)	Amount Spent on Education ($)	Percentage Spent on Education (%)	Helped to Enroll in More Credit Hours (%)	Helped to Graduate Early (%)
GPA					
0.0–2.0	1520.00	632.00	37.9	20.0	19.4
2.0–2.5	1424.24	742.03	56.3	25.6	31.4
2.5–3.0	1470.00	858.52	61.8	26.1	22.6
3.0–3.5	1521.00	925.10	63.8	25.2	24.4
3.5–4.0	1577.53	774.75	52.7	16.6	15.1
Age					
18–19	1364.67	710.22	50.5	21.1	28.6
20–21	1361.21	853.14	60.3	20.3	17.1
22–23	1427.27	830.86	62.1	22.8	20.4
24–62	1767.66	868.96	56.7	17.1	16.8
Student debt					
Yes	1521.83	891.70	63.6	17.3	19.4
No	1573.66	784.20	52.8	24.7	20.3
Average bank balance					
<$500	1585.54	980.75	64.9	22.0	26.7
$500–1000	1543.01	864.56	59.2	27.3	24.8
$1000–2000	1495.39	803.21	60.6	26.5	21.3
>$2000	1488.70	663.27	49.8	12.2	11.6

Next, we compare ex-ante perceptions of nonrecipients (as a proxy for the ex-ante perceptions of recipients) with ex-post perceptions of recipients on how stimulus money helped them to enroll in additional credit hours and to graduate early. Among nonrecipients, 41.4% thought that any stimulus money, if received by them, would have been helpful to enroll in additional credit hours, while only 20.4% of recipients thought it helped the goal, a gap of –21.1%. Similarly, 26.6% of nonrecipients thought stimulus payments would have helped them graduate early, but only 19.8% of recipients thought so, a –6.8% gap. These unconditional mean differences across the perceptions of these two groups were adjusted for observable differences in age, gender, race, Hispanic origin, class standing, nationality, GPA, indebtedness, and liquid financial assets using a probit model; results are presented in Table 3. Based on probit incremental effects, the perceptions of nonrecipients about the expected benefits of stimulus money on their education outcomes were stronger than were the perceived benefits of actual recipients. After controlling for the observable covariates, the magnitude of the difference between the ex-ante and ex-post perceptions increased when compared to the unconditional mean differences of those

reported above. Conditional on those covariates, having received the stimulus implied 22.6% less likelihood of reporting that the stimulus helped recipients enroll in more credit hours when compared to nonrecipients' perceptions. Similarly, recipients were 9.2% less likely to be able to graduate earlier than their nonrecipient counterparts' perceptions.

Table 3. Ex-ante vs. Ex-post Perceptions (Probit Incremental Effects)

	Helped to Enroll in More Credit Hours (%)		Helped to Graduate Early (%)	
	Estimate	**Std. Error**	**Estimate**	**Std. Error**
Recipient	–0.226***	0.030	–0.092***	0.030
Gender (Excluded: Male)				
Female	0.068**	0.029	–0.020	0.027
Nonbinary	0.122	0.113	0.069	0.101
Race (Excluded: White)				
Black	0.166***	0.044	0.152***	0.039
Asian	0.182***	0.045	0.091**	0.043
Other/Mixed	0.021	0.048	0.091**	0.043
Hispanic origin				
Hispanic	0.158***	0.050	0.050	0.047
Class standing (Excluded: Freshman)				
Sophomore	0.002	0.051	0.042	0.046
Junior	–0.028	0.056	–0.032	0.052
Senior	–0.137**	0.061	–0.076	0.056
Nationality (Excluded: Domestic)				
International	0.005	0.065	0.026	0.061
GPA (Excluded: 3.5–4.0)				
0.0–2.0	0.057	0.090	0.097	0.079
2.0–2.5	0.053	0.060	0.128**	0.053
2.5–3.0	0.063	0.041	0.041	0.038
3.0–3.5	0.077**	0.033	0.088***	0.031
Age (Excluded: 18–19)				
20–21	–0.039	0.050	–0.040	0.045
22–23	–0.007	0.061	–0.026	0.057
24–62	–0.054	0.062	–0.015	0.056
Student debt (Excluded: No)				
Yes	0.056*	0.029	0.031	0.027
Average bank balance (Excluded: <$500)				
$500–1000	0.021	0.041	–0.056	0.037
$1000–2000	–0.042	0.044	–0.065	0.040
>$2000	–0.060	0.039	–0.111***	0.036

*p < .1 **p < .05 ***p < .01

Table 4 shows the effect of various demographic factors on investments in education and the share of stimulus money invested in education using two-step Heckman selection models (Heckman 1979). Although observable covariates demonstrate some noticeable differences across the recipients and nonrecipients based on the estimated coefficients of the selection equation,[4] we did not see a strong effect of unobservable factors on the coefficient estimates of the outcome equation. In addition, the coefficients of all other variables except the Asian racial category were statistically insignificant. Asians spent \$414 and 41.8% more of the stimulus money they received than did White students.

Table 4. Additional Investments on Education (Heckman Selection Model)

	Investment in Education (\$)		Share of Stimulus Money Invested in Education (\$)	
	Estimate	**Std. Error**	**Estimate**	**Std. Error**
Gender (Excluded: Male)				
Female	48.17	98.16	–0.059	0.061
Nonbinary	–93.01	443.49	–0.001	0.247
Race (Excluded: White)				
Black	192.14	268.71	0.087	0.160
Asian	414.38**	174.75	0.418***	0.105
Other/Mixed	–53.14	164.73	0.005	0.103
Hispanic origin				
Hispanic	251.97	225.93	0.032	0.139
Class standing (Excluded: Freshman)				
Sophomore	330.44	258.99	0.180	0.161
Junior	190.48	204.53	0.188	0.127
Senior	–43.69	225.92	0.015	0.137
Nationality (Excluded: Domestic)				
International	–180.71	1158.31	0.033	0.676
GPA (Excluded: 3.5–4.0)				
0.0–2.0	–318.92	304.39	–0.182	0.186
2.0–2.5	–49.32	216.08	0.052	0.124
2.5–3.0	–62.01	134.61	0.022	0.082
3.0–3.5	140.64	113.53	0.105	0.070
Age (Excluded: 18–19)				
20–21	124.83	348.11	–0.027	0.204
22–23	242.83	680.39	0.000	0.404
24–62	383.36	1215.47	–0.103	0.722

Table 4. Additional Investments on Education (Heckman Selection Model), concl.

	Investment in Education ($)		Share of Stimulus Money Invested in Education ($)	
	Estimate	**Std. Error**	**Estimate**	**Std. Error**
Student debt (Excluded: No)				
Yes	171.97	207.27	0.122	0.124
Average bank balance (Excluded: <$500)				
$500–1000	–123.89	195.05	–0.083	0.116
$1000–2000	–139.77	167.68	0.017	0.098
>$2000	–296.07	288.71	–0.125	0.173
Constant	244.96	1967.97	–0.073	0.681
Inverse Mills Ratio	231.18	1145.95	–0.073	1.173

**p < .05 ***p < .01

DISCUSSION

The affordability of higher education and the role of government education policy have been widely studied. Trostel (2010) estimates and compares the cost of government subsidies on college education with resultant increases in tax revenue and shows that the direct extra tax revenues collected from college graduates over their lifetime are more than six times the gross government expenditure spent on a college degree. Lawson (2017) estimates that optimal subsidies on college education are larger than median public expenditure by about $3,000 per year. Literature also supports government subsidies on higher education on the grounds of liquidity constraints (Lochner and Monge-Naranjo 2012).

In addition to external barriers, internal behavioral barriers also may cause some students to underinvest in education. Lavecchia, Liu, and Oreopoulos (2016) present and explain behavioral reasons that some students do not treat education as an investment. Some students focus too much on the present (present bias), some rely too much on routine, and some focus too much on negative identities. When there are too many options with too little information, mistakes are more likely. Volpe, Chen, and Pavlicko (1996) conclude that college students have inadequate knowledge of personal investment basics and observe a strong correlation between financial literacy and the academic performance of students. A similar study by Chen and Volpe (1998) points to the same conclusion but also finds that the scores in the financial literacy test administered by the authors were lowest for subgroups such as non-business majors, women, and those with little work experience.

In this paper, we report preliminary results of a survey on the impact of a positive income shock in the form of a general subsidy on college students. The results shed light on how untargeted transfer payments to families are translated into education investments. The findings of this research are useful in many ways, particularly to policymakers in education. They help to understand the pass-through process of general subsidies into

investments in education, as well as the heterogeneous effects on various demographic groups. The results are useful for estimating the effect of various subsidies and/or increases in family income on demand for credit hours. They also help to find the cost effectiveness of tax benefits and subsidies by comparing the cost of such policy measures versus expected future tax revenue through increased earnings. This paper uniquely attempts to capture the effect of stimulus checks not only on the spending patterns of college students in general but also on their investments in education, credit hours enrolled, and time to graduate. It also sheds some light on the possible impact on education of a move toward universal basic income (Hoynes and Rothstein 2019).

The main limitation of this study is that it is based on data collected from one university. Another limitation is that it measures the outcomes subjectively, as reported by the respondents. In addition, the analysis in this paper was not extended to investigate how investments in education using other sources of funds have been substituted. Despite these limitations, the findings provide very useful insights for future researchers working on income effects of education investments and education outcomes.

NOTES

1. This could also mean that students from families of low SES are increasingly enrolling in two-year colleges as a stepping-stone before enrolling in a four-year college, and not necessarily because of the increased cost of attending a four-year college.
2. Based on the ratio of the two preceding numbers, this should be 54.9%; however, the value is different because of item nonresponse. The calculated percentage of stimulus money spent on education is based on those who reported both the amount of stimulus money they received and the amount they spent on their education.
3. The results of Heckman selection models, presented later, however, did not reveal any statistically significant effect of these variables.
4. The results of the first-stage probit model are presented in Appendix B.

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APPENDIX A. SURVEY QUESTIONNAIRE

Q1 On March 11, 2021, the American Rescue Plan Act was signed into law which made provisions for the third round of Economic Impact Payment for U.S. residents who earned less than $80,000 in 2020 and the couples who filed their taxes jointly and earned less than $160,000. Did you receive this payment?

- ○ Yes (1)
- ○ No (2)

Q2 I did not receive this payment because:

- ○ My family income was too high to qualify (1)
- ○ I was not an eligible U.S. resident for a reason other than the income (2)
- ○ Some other reason (3) _____

Q3 How much did you receive?

- ○ $1400 (1)
- ○ Some other amount (2) _____
- ○ Not applicable (3)

Q4 Were you in a position to decide how to spend the third round of Economic Impact Payment you received that was meant for you?

○ Yes (1)
○ No. I was a dependent on someone else's tax return and I did not have control over this money (2)
○ Not applicable (3)

Q5 Out of this money, how much did you spend on education-related expenses including tuition and fees, room and board, books and other supplies, transportation, and other personal expenses or for paying student loans? (If you were not a recipient of the stimulus checks handed out by the IRS in March 2021 or were not in a position to control this money, please answer how you would have spent it if you were a recipient and were in a potion to spend this money.)

_____

Q6 Did this economic stimulus payment help you enroll in more credit hours than you would normally have without this payment? (If you were not a recipient of the stimulus checks handed out by the IRS in March 2021 or were not in a position to control this money, please answer how you would have spent it if you were a recipient and were able to spend this money.)

○ Yes (1)
○ No (2)

Q7 Did this economic stimulus payment help you to graduate earlier than you would without this payment? (If you were not a recipient of the stimulus checks handed out by the IRS in March 2021 or were not in a position to control this money, please answer how you would have spent it if you were a recipient and were able to spend this money.)

○ Yes (1)
○ No (2)

Q8 Which option best describes how you spent your stimulus check? (If you were not a recipient of the stimulus checks handed out by the IRS in March 2021 or were not in a position to control this money, please answer how you would have spent it if you were a recipient and were able to spend this money.)

○ Paying back student debt (1)
○ Paying tuition and fees (2)
○ Purchasing items for school (Laptops, textbooks, other school-related resources) (3)

- On entertainment (Online video/music streaming subscriptions, tickets to sporting events, movie theaters, etc.) (4)
- On recreation (Dining outside, bars, clubs, gym membership, etc.) (5)
- On home appliances (television, microwave, refrigerator, virtual home assistant, etc.) (6)
- Other misc. spending (7)
- On rent or other utilities (Electric, Wi-Fi, water, etc.) (8)

Q9 What is the single biggest source of expenditure for you in an average month?

- Debt payments (1)
- Rent/Utilities (2)
- Entertainment (3)
- Recreation (4)
- Other spending (5) _____

Q10 Please indicate your gender.

- Male (1)
- Female (2)
- Nonbinary/third gender (3)
- Prefer not to say (4)

Q11 What race do you identify with most closely? (Select all those that apply)

- ☐ Caucasian/White (1)
- ☐ Black/African American (2)
- ☐ American Indian/Alaska Native (3)
- ☐ Asian (4)
- ☐ Native Hawaiian and Pacific Islander (5)
- ☐ Other (6) _____

Q12 Do you identify as Spanish, Hispanic or Latino?

- Yes (1)
- No (2)

Q13 What is your age?

- <18 yrs (1)
- Type an age (2) _____

Q14 What was your class standing in school as of January 2021?

○ Freshman (1)
○ Sophomore (2)
○ Junior (3)
○ Senior (4)

Q15 Please indicate your student status:

○ In-state student (1)
○ Out-of-state student covered by the Midwest Student Exchange Program (MSEP) (2)
○ Out-of-state student not covered by the Midwest Student Exchange Program (MSEP) (3)
○ International Student (4)

Q16 What is your current cumulative GPA?

○ less than 2.0 (1)
○ 2.0–2.5 (2)
○ 2.5–3.0 (3)
○ 3.0–3.5 (4)
○ 3.5–4.0 (5)

Q17 What is/are your major(s) as seen on your transcript? (If you have more than one major, please write each one in a separate text entry box)

○ Write your major (1) _____
○ Write your major (2) _____
○ Write your major (3) _____

Q18 What school(s) are you affiliated with? Please check each school you are a part of. If you are a part of the Honors College, please select it separately.

(Answer choices for this question were removed from this version.)

Q19 Do you currently have any outstanding student debt?

○ Yes (1)
○ No (2)

Q20 How much do you maintain in your checking and savings accounts on average?

- ○ less than $500 (1)
- ○ $500–1000 (2)
- ○ $1000–2000 (3)
- ○ Over $2000 (4)

APPENDIX B. FIRST STAGE OF HECKMAN SELECTION MODELS

	Was a Recipient of the Stimulus	
	Estimate	**Std. Error**
Gender (Excluded: Male)		
Female	0.039	0.089
Nonbinary	–0.288	0.363
Race (Excluded: White)		
Black	0.369***	0.139
Asian	0.037	0.148
Other/Mixed	0.052	0.152
Hispanic origin		
Hispanic	0.220	0.158
Class standing (Excluded: Freshmen)		
Sophomore	0.223	0.172
Junior	0.028	0.186
Senior	–0.165	0.199
Nationality (Excluded: Domestic)		
International	–1.185***	0.283
GPA (Excluded: 3.5–4.0)		
0.0–2.0	0.262	0.275
2.0–2.5	0.203	0.187
2.5–3.0	–0.180	0.127
3.0–3.5	–0.001	0.103
Age (Excluded: 18–19)		
20–21	0.338**	0.166
22–23	0.818***	0.196
24–62	1.718***	0.192
Student debt (Excluded: No)		
Yes	0.272***	0.089
Average bank balance (Excluded: <$500)		
$500–1000	0.218*	0.131
$1000–2000	0.105	0.140
>$2000	0.393***	0.123

*$p < .1$ **$p < .05$ ***$p < .01$

Emotional Labor, Worker Solidarity, and Safety Concerns among Police and Nurses

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ABSTRACT

To understand the connections among emotional labor, solidarity, and safety, 19 police officers and 20 nurses were interviewed for this study. Data analysis with words as the unit of analysis engaged both deductive and inductive processes. This qualitative study demonstrates that, despite numerous differences, both nurses and police have a professional focus on safety; however, while nurses' safety concerns are first for their patients, police officers' first concern of safety must be for themselves and their coworkers. Additionally, nurses and police officers differed in why they perform emotional labor. Nurses engaged in emotional labor in order for their charges to feel closer to them, whereas police engaged in emotional labor to create distance between themselves and the community members they encountered. For both professions, solidarity and teamwork increased their ability to engage in the necessary emotional labor, handle challenges, and better succeed in securing safety.

KEY WORDS Worker Solidarity; Emotional Labor; Safety; Police; Nurses

Policing and nursing are, in some ways, professions with contrary motivations and opposite types of power. Nurses work to heal injuries, liberate, and save lives, using an array of therapies and techniques to enable their patients to becoming safer and healthier (Cricco-Lizza 2014; McQueen 2004). Police have the power to injure, constrain, and possibly even kill the body, sometimes needing to use great force in order to keep themselves and others safe (Agocs, Langan, and Sanders 2015; Campeau 2015; Phillips 2016). Despite these stark

differences, both police and nurses perform much work within similarly stressful circumstances and must negotiate tense interactions both between themselves and their community members and among their coworkers.

An important concern of both nurses and police is safety. Nurses work to ensure the safety of those in their care, despite the dangers of disease and injury and the risks of treatments and medical procedures (McQueen 2004). Police officers seek to protect the safety of community members as well as their own safety, ideally de-escalating disruptions and preventing violent occurrences (Campeau 2015; Phillips 2016).

These professions require specific types of emotional labor—i.e., the performance of specific emotions as a necessary part of one's job. Although other studies of emotional labor have examined how various job duties, workplace hierarchies, occupational norms, and organizational goals can affect how employees perform emotional labor, few, if any, have examined the interplay of emotional labor and solidarity in achieving safety goals. This article examines how workers' emotional labor and solidarity among employees intersect with the safety concerns of these professions. We interviewed 19 police officers and 20 nurses, using an open-ended interview protocol. We analyzed the resulting transcripts with words as the unit of analysis, engaging both deductive and inductive processes.

In this paper, we present empirical findings regarding the importance of *closeness* (nursing) and *distance* (police). We found that both nursing and policing require substantial emotional labor but that nurses more often reported using emotional labor to create affectionate *closeness* between themselves and their patients. This closeness is key to caring for their patients, their health, and their safety. In contrast, police officers more often described engaging in emotional labor when they had to maintain *distance* between themselves and the public. This distance is necessary to keep themselves, their coworkers, and the general public safe. Emotional labor was thus described by interviewees as necessary for maintaining their goal of safety.

The professions also differed in the direction of their focus on safety. In nursing, the safety of the patient is the goal; the patient is someone outside the profession. In policing, interviewees often mentioned concern for the safety of themselves and their fellow officers—that is, the safety of those within the profession. These differences reflect the contrasting emotional labor goals of closeness/distance. [Although gender is also a key difference, because the extant literature already provides ample discussion of gender(ed) aspects of emotional labor (see Erickson and Ritter 2001), this article focuses on the abovementioned differences in order to advance the literature.]

A key similarity for both professions in ensuring safety was the importance of solidarity, defined as connectedness, loyalty, and shared purpose (Campeau 2015; Morrill, Zald, and Rao 2003). Solidarity furthered safety goals directly by enabling effective teamwork. It also advanced safety goals indirectly, by helping workers perform that emotional labor critical for their goal of safety.

LITERATURE REVIEW

Jobs that interact with the public require workers to have skill sets that facilitate those interactions. Emotional labor—employees' management of their feelings in order to perform

specific emotions as mandated by their jobs—is often an important skill needed by both nurses and police officers (Hochschild 1983; Hoffmann 2016; Lively 2002; Pierce 1996; Polletta and Tufail 2016; Wharton 2009). Although emotional labor is a common workplace requirement, it can be very stressful for the individual worker (Grandey, Fisk, and Steiner 2005). Coworker solidarity can lessen the strain from emotional labor as well as other workplace stressors (Jasper 2005). In the two professions examined in this article—nursing and policing—coworker solidarity can be critical in effectively achieving the goals of each profession.

Emotional Labor

Jobs often require their employees to perform specific emotions that further workplace objectives, despite employees not genuinely feeling those emotions (Kunda and Van Maanen 1999). This is particularly true for jobs that involve regular interaction with members of the public. Often, workers' performance of these emotions is necessary to achieve organizational goals, such as comforting the client (Lively 2002) and ensuring consumer satisfaction (Sharma and Levy 2003) and passenger loyalty (Hochschild 1983).

Displaying non-genuine emotions can be very taxing for employees (Wharton 2011). Hochschild (1983) coined the term *emotional labor* to address such employees' emotion-management practices and how emotions are used as a tool in a "service-producing society" (p. 32). Not all emotional labor is about performance of insincere emotions; emotional labor also involves suppression of sincere emotions. Hoffmann explains, "Some emotions need to be suppressed and others need to be performed even if not sincerely felt" (Hoffmann 2016:169).

Unfortunately, emotional labor can create substantial health costs (Singh and Glavin 2017) and is associated with absenteeism, emotional exhaustion, job burnout, turnover, and irritability in interactions (Grandey, Fisk, and Steiner 2005). For example, Wagner, Barnes, and Scott (2014) documented how difficulties in an employee's home life, including insomnia and emotional exhaustion, were linked with the employee's emotional labor in the workplace. Some research indicates that the negative effects of emotional labor can be mitigated, however, such as by conceptualizing the emotional labor as integral to a "kind of socially valued role" (Polletta and Tufail 2016:401).

Emotional labor often reflects conventional gender norms based on the dominant gender of the occupation. Although job markets that had been more exclusively male now include more women (Stainback, Ratliff, and Roscigno 2011), gender roles and stereotypes still persist (Connell and Messerschmidt 2005; Young 2017). This implies that emotional labor to convey nurturance and caring might be more prevalent in nursing (Diefendorff et al. 2011), while emotional labor to convey dominance and authority might be more prevalent in policing (Campeau 2015). Presenting conventional gender behaviors as part of one's required emotional labor, particularly when one does not appreciate or sincerely present those gender-related attributes, can further exacerbate the toll of emotional labor (Bulan, Erickson, and Wharton 1997).

Among nurses, some studies indicate, emotional labor is a key variable not only in the quality of care they are able to provide but also in the quality of work life for nurses themselves. For example, Cricco-Lizza's ethnographic study of neonatal intensive care unit

nurses found that "[e]motional labor was an underrecognized component in the care of vulnerable infants" (2014:621). Similarly, Henderson's study of nurses found that many nurses believed that their ability to engage or disengage emotionally was a critical skill in their ability to deliver quality care (Henderson 2001). A study specifically of emotional labor among nurses in a large hospital system found that various display rules of emotional labor were associated with job satisfaction for the workers and also allowed them to better focus on their patients (Diefendorff et al. 2011).

Among police, emotional labor had both costs and benefits. For example, Adams and Buck found that although the performance of emotional labor can be burdensome in itself, it could benefit officers by mediating stress from interactions with civilians and suspects (Adams and Buck 2010). Similarly, a recent study of Portuguese police officers demonstrated not only the negative effect of suppressing negative emotions and expressing positive emotions but also the positive effect that doing so had on officers' occupational identity (Oliveira et al. 2023). In Holland, a study of emotional labor among Dutch police officers found that surface-level performance of prescribed emotions was used to improve performance of the officers' duties (VanGelderen, Konjin, and Bakker 2017).

Coworkers sometimes assist one another through their performance of emotional labor (Kunda and Van Maanen 1999). Additionally, coworkers themselves can be the focus of emotional labor efforts when these efforts further organizational goals. An example would be if the organization needs everyone to work overtime; coworkers might feel compelled to act more willing, or at least less resentful of this imposition, in front of their coworkers, given that they all need to tolerate the overtime for the organization (Hoffmann 2016).

Coworkers and Solidarity

Solidarity is often understood as connectedness, loyalty, and shared purpose among groups of people engaging in a similar cause or activity, such as coworkers (Campeau 2015; Morrill et al. 2003). Coworker solidarity can ameliorate many workplace struggles. Effective worker solidarity includes both "affective and instrumental elements" (Hodson 2001:202). In other words, worker solidarity requires sentiments of affiliation and belonging, but also practical assistance for workers dealing with external threats or internal struggles. Workers' solidarity includes expressions of group membership, as well as teamwork to address concerns among coworkers (Hodson 2001).

Solidarity can be heightened by displays of emotional labor (Hoffmann 2016). On the police force, coworkers engage in emotional labor to heighten camaraderie and facilitate teamwork, as well as to display authority when interacting with civilians. Both teamwork and commanding authority are crucial components of police work (Campeau 2015). Similarly, nurses must *care for* and *care about* their patients, yet this caring demeanor is not always sincere, especially when the nurses are dealing with much strain and stress. "When nurses do not feel as they think they ought to feel in particular situations they engage in emotional labor to manage, control or alter their emotional status to correspond with what they believe is appropriate for the situation" (McQueen 2004:104).

METHODS

These data were collected by students in two undergraduate sociology honors classes at a large land-grant university in the midwestern United States. Each class had four students enrolled. Institutional review board approval was secured for the research before students began conducting interviews. The student researchers decided to study nursing and policing because both professions require similar levels of education and share an ethic of service. Traditionally, both professions were often union-represented, and both are described in the literature as having substantial solidarity among coworkers. Often, both professions work in 24/7 organizations. While these two professions traditionally have drawn different sexes—police having more men and nursing having more women—increasingly, both professions have members of both sexes (male nurses and female officers).

Interviewees were located through cold-calling, personal contacts, and snowballing. Student researchers located interviewees by contacting police departments and healthcare organizations and then both directly asking for volunteers and receiving assigned interviewees from supervisors who solicited interview volunteers from their subordinates. Some students had friends or relatives who were nurses or police who were willing to be interviewed. Finally, each interviewee was asked for referrals to other contacts who might be willing to be interviewed. Which particular law enforcement or medical organization was contacted was up to each student. While these interviews were not random samples, randomness is not necessary because we were interested in learning about certain processes within these professions and make no claim to universality of our findings. The benefit of the qualitative method is not its generalizability but its ability to produce a richness of data of deeper inquiries.

Interviews

After practicing their interview technique on each other and on one person outside of class who was not a police officer or a nurse, each student located and interviewed several nurses and some police officers. Although each student contributed the same number of interviews (5), the proportion of nurses to police was not always the same between students. Combined, the two classes conducted 39 in-depth semistructured qualitative interviews (one student could complete only 4 interviews). The data produced by all 39 interviews were analyzed for this paper.

Within three days of conducting an interview, the student transcribed the interview. The instructor observed the student-with-student practice interviews and reviewed both the recordings of the outside-of-class practice interviews and the first real interview for each student. She also reviewed the transcripts of all interviews throughout the study and provided guidance and feedback throughout the data-gathering stage, periodically meeting one-on-one with students as well as providing written suggestions.

All interviewees met two requirements: (1) They had completed training within their occupation (nurses had graduated and passed their boards, and police officers were no longer enrolled at a police academy) and (2) their work assignments involved working directly with the public. We thus excluded anyone in supervisory, administrative, or

clerical positions. Interviews began with the basic introductory question, "Could you describe what you do on an average day?" Students then worked their way through the interview protocol, which contained many open-ended questions, probing deeper whenever the interviewees' responses warranted. In writing the interview protocol, each student contributed a set of questions out of their topical interest so that at the end of the interviewing period, each student had a body of data that addressed their particular focus. For this reason, all questions in the protocol were asked by all student interviewers. Question sets included broader questions, specific inquiries, and follow-up prompts. The resulting data from all student interviewers were analyzed by the specific student who had crafted the associated questions (explained more below, under "Coding").

Questions covered a variety of topics, including job duties, laws in the workplace, work-life balance, stress at work, mental health, religion in the workplace, autonomy, upbringing, and learning on the job. Basic demographic questions were also asked, including age, race, marital status, religious preference, and annual household income. This paper drew particularly on questions within the interview protocol about stress, stress management, emotions, emotional labor, safety, and coworker relationships.

The police interviewees were mostly males, and the nurse interviewees were mostly females. The majority of the participants were White, Christian, and married; however, the interviewees' ages ranged widely (Table 1).

Table 1. Interviewee Demographics

	Police	Nurses	Total
White:Nonwhite	18:1	16:4	34:5
Men:Women	16:3	5:15	21:18
Married:Unmarried	13:6	18:2	31:8
Over 30:Under 30	10:9	9:11	19:20
	19	20	39

Coding

All of the interviews were recorded and transcribed to enable direct quotations. Each student was responsible for coding the same specific parts across all interviews collected, based on which questions they contributed to the interview protocol. Coding reflected concepts that the classes generated. Each student then separately analyzed those questions that they coded to develop their particular research focus.

Students were taught qualitative analytical techniques as part of the course. In addition to reading about qualitative analytical methods, the class collectively read through transcripts on the projection screen and reviewed several interviews in class, discussing possible codes and debating analysis options. These discussions and practice sessions helped hone students' qualitative analytical skills.

Drawing partly on the literature reviews the class conducted and partly on their own analysis of the data, students used a combination of inductive and deductive methods. They

drew on their synthesis of the literature to draft research protocols and craft basic codes, then closely read the transcripts, identified and analyzed themes, developed additional codes, and finally, as a class, discussed the transcripts and possible codes. (Lists of codes and themes are available from the authors upon request.)

Students uploaded all transcriptions to a shared Google Drive folder and also kept a copy of their transcripts separate from the shared folder. Within the Google Drive, they read and reread everyone's transcripts and created a set of codes using different fonts and colors. For example, the combination of Comic Sans and dark purple represented the code *challenges*, while the combination of Rockwell and dark red 1 represented the code *teamwork*. Each researcher developed their own codes for their specific section of the interview, based on which interview questions they had contributed.

Words were used as the unit of analysis for the coding. A combination of deductive and inductive processes was used. Students initially created codes based on certain concepts that were drawn from the relevant literature. As they coded, they then created additional codes and subcodes that emerged from the data.

The coding process began with each student using their own copies of the transcripts, applying these main codes to their own section of questions within their own interviews: Researcher 2 on Researcher 2 interviews, Researcher 3 on Researcher 3 interviews, etc. To apply their codes, each student read their interviews until they found a statement that matched a code. For example, in one interview, the participant responded to a question by saying, "Staffing ratios are down." This represents a challenge, so the text was converted to match the *challenge* code in dark-purple Comic Sans font.

After the main codes were applied, subcodes were developed. Subcodes broke down the broad codes into more specific codes. For example, some of the subcodes for the *solidarity* code included teamwork, training, frustration, humor, and conflict. Comments were made within the documents to signify which subcode was represented. Not every main code contained a subcode, but those that could be broken down further were. Subcodes allow for greater specificity in analysis and facilitated student discussion about the importance and influence of various factors during class discussions.

Next, students read another student's transcript sections and applied those codes. The two files were then compared and students discussed where and how the coding was appropriate and correct. This reliability check involved Researcher 2 coding Researcher 3's interviews for Researcher 3's interviews questions, then Researcher 3 coding Researcher 4's interviews for Researcher 4's questions, and so forth. This ensured that the interviews were coded consistently and correctly. It also clarified that the codes were clear to someone who had not created them in order to make the application of coding more transparent.

This particular article grew out of a paper of a student, coauthor Ms. Emily Cunningham, who had a research interest in emotional labor in different types of interactions. (Her set of interview questions to capture this inquiry is available upon request from the authors.) Small modifications were made to the quotations to enhance readability. Passages with unnecessary filler words were edited to provide clarity for the reader. Sentences that were difficult to understand were filled in with implied phrases or words, and profanity/vulgarity was removed. Interviews' assigned numbers are based on the chronological order and the interviewer who conducted the interview.

We do acknowledge the shortcomings of interviewing about intimate emotional experience, especially with student interviewers. Both police and nurses were sharing accounts with unknown interviewers about their understanding of emotional labor at work. It is quite possible that many interviewees were unable to recall/communicate about their emotional experiences or misrepresented their true emotional experiences. Additionally, it is possible that these stated emotional practices were actually just common occupational rhetoric about emotional work that is common in each field rather than mapping the actual emotional experiences. Many interviewees may have discussed their emotional labor in an honorable light/manner, obscuring their actual emotional experiences from the interviewers. These concerns do not undermine the project; they are noted here as a respectful caveat to readers.

RESULTS

Both police and nurses are charged with the general health of their communities. Police address local violence and disturbances throughout their communities, using the force of the state when deemed necessary, as well as providing assistance for those in need; simply their presence in their communities affects those communities' actions. Nursing care generally ameliorates illness and injury, in addition to preventing future issues through preventative care.

Emotional Labor to Enable Closeness versus Distance

Both nurses and police described frequently performing emotional labor. Emotional labor was employed for a variety of reasons and for a range of audiences (e.g., the public, patient/arrestee, coworkers, supervisors, and oneself); however, a key difference that emerged from the data was that nurses in this study often described their emotional labor as displays of encouragement, compassion, and other emotions to enhance a closeness in the nurse-patient relationship:

> [You have to put on] a smile and show that you care about them and "know it will all be okay." You can't make it seem like you worried. Not to the families, if you can swing that, and not to the patients, definitely. . . . They have to like you, to trust you. To have that belief that you'll help them get better. . . . If *they* worry, they'll fight you or they will worry themselves more sick. (Interview 37)

This nurse's statement described her emotional labor of displaying an artificially confident countenance in order to put her patients at ease, enable their recoveries, and facilitate their safety.

The emotional labor that police officers perform could sometimes be described as the opposite, to create distance between themselves and community members. The officer

below describes holding back any displays of compassion, which he says can be difficult when he relates to the civilian on an emotional level:

> You can't wear your heart on your sleeve, or you'll never
> be able to do your job. You've gotta be the tough guy [you
> can't get sentimental or seem soft], or you can't be
> effective in your job. . . . They can trust you, but maybe
> they shouldn't like you. (Interview 11)

The officer explained how he had felt sympathy for domestic violent victims and civilians suffering from mental illness but had created emotional distance to maintain his authority and preserve his safety.

Emotional Closeness versus Distance to Facilitate Safety

Nurses explained that they often were very conscious of their efforts to display only those emotions that would make patients feel more at ease, trusting, and emotionally close. For example:

> I'm always careful of the words I choose when dealing with
> patients. You always have to be conscious of making a very
> good experience for them or the best experience they can have
> in an unfortunate situation, so I always try to be . . . I always
> try to be upbeat and positive. [I] don't bring problems to
> work. I'm just there for the [patients and their families] . . .
> and my job is actually easier if I show that I'm there for them.
> Because by making their experience here a bit better, by
> showing I care, and care about them, then they will be more
> helpful and willing to follow doctors' orders and all. Willing
> not to make things harder or by [risking harming themselves]
> by not being [compliant]. (Interview 22)

This nurse described choosing her words carefully to convey specific positive emotions, in order to increase her ability to keep the patient safe.

Sometimes nurses had to *not* display certain emotions in order to maintain that closeness, as this pediatric nurse explained:

> I've had parents say things that were homophobic, which I
> don't really talk about with the families, but it definitely
> puts me a little bit on guard that, if I did talk about [my
> LGBTQ identity], it might harm [the closeness] the patient
> feels. . . . When they say something homophobic, I don't
> really respond. I certainly don't react with how I really feel.
> I can't. If I showed how I felt when they said [homophobic

> comments], I'd upset them, and I'd also probably tell them
> that I'm gay. And they wouldn't like that. Then what?! I
> don't want them to not listen to me or not let me provide
> necessary care or instruction to their kid because they [feel
> uncomfortable] about [me being LGBTQ]. . . . My goal is
> these kids' well-being, getting them well, getting them out
> of [the hospital]. I can't let their parents' [homophobia] get
> in the way, so I pretend to be something I'm not for the
> kids' sake. (Interview 23)

This nurse believed she must mask her identity and not show her dismay at families' homophobia. Although she did not like the homophobia expressed by patients or their families, she believes that displaying her genuine reactions, possibly disclosing her LGBTQ identity in the process, would distance her from them and could lead to them refusing her care. Her emotional labor maintained friendly relations with the families so they allowed her to continue care and to maintain her patients' safety.

The nurse quoted below, who also worked in a pediatric ward, described how she had to get her patients to feel safe so they would like her enough to do what they needed to do in order to actually be safe:

> Sometimes people are just reluctant to do something.
> Maybe they're exhausted or scared. Or they don't like
> being here. But you have to get them [to do what the
> hospital and doctors] need them to do. Otherwise, they
> might not get better, or lots of the time, they might put
> themself in danger and at risk. So you have to talk them
> into it. Make them feel safe. If they like you, they'll listen
> to you. (Interview 31)

Similarly, another pediatric nurse described having to work to get patients and their families on her side in order for those patients to get the care they needed:

> Some parents don't understand or they don't want
> something to be done. Or the kids don't want to go along
> with something they have to do or that you have to do to
> them. I get it. A hospital is a bad place. It's not fun. . . .
> You gotta get them on board. So you might be in a [bad]
> mood, but you hide that. [Instead,] you smile, you tease,
> you help them see what needs to happen, but for that you
> need to make that connection. That personal connection.
> Person-to-person so you create a relationship, so they see
> you as their friend, that you're on their side and they can
> listen to you. (Interview 35)

All these nurses described how they had to engage in emotional labor in order to establish that closeness with their patients in order to ultimately keep those patients safe and healthy.

In contrast to nurses trying to feel closer to their patients to keep them safe, police officers created distance between themselves and civilians. One police officer explained that, even after he had taken someone into custody, he still had to perform a certain level of emotional labor to maintain distance. This emotional labor was most important when he felt sympathy toward a suspect; he worried that if he showed this genuine emotion, that sympathy would be misinterpreted as a signaling that the suspect could challenge his authority:

> [Even once you've arrested a suspect], you have to be firm, you have to be assertive, and you have to draw the line, and sometimes you have to exercise discipline [so you can't make it seem] like they can walk all over you. You can't be all simpatico. No matter how you feel, you can't have it seem like they have you on their side. You have to hold that back. [Otherwise,] they'll think they can try something or [challenge your authority]. And that can be really dangerous. (Interview 14)

He also explained the importance of exuding authoritativeness at all times in order to maintain his own safety.

In order to maintain this safety, officers had to create distance and assert authority. A junior police officer discussed how creating emotional distance in itself is an assertion of authority:

> You can't let yourself get sucked in [to the civilians' battle]. You gotta show that you are there to help but you can also arrest all of them and you don't care about some squabble or whatever. You gotta establish order, and the first thing to do is showing that you won't be drawn into their whole mess. . . . If you don't, then someone thinks you're on someone else's side, and then everyone joins together to turn on you, and then you really have trouble. (Interview 30)

He believed that maintaining emotional distance was essential to remaining in control and staying safe during potentially dangerous situations. The following interviewee would agree:

> You might go out there [to a neighborhood call], and you might [be really worried for] whoever called [the police for help], but the first . . . [emotion] you have to show is strength. . . . You might feel bad for someone or worried or

> concerned. But you can't start out showing that. [You must
> show that] you're tough, you know. You're not going
> anywhere [without resolving the situation]. Otherwise,
> you're [physically] vulnerable. You seem easy, people will
> make more trouble for you. (Interview 23)

The above quote from a mid-career officer underlines the belief in constant threat to officer safety, particularly if an officer does not show strength. An older officer explained this concept similarly:

> We join because we care, you know? Young guys, they join
> because they want to serve their communities. . . . But
> when you are out there—and I don't care who it is,
> housewife, meth [slur] college kid—they see the badge,
> they see you and it becomes you against them. Even if they
> are the one who called [the police initially] sometimes. . . .
> You feel for them. You really do. . . . If they weren't
> having trouble, you wouldn't have been called. But you
> can't get involved like that. You have to stay back to
> yourself. You realize you gotta think of your own safety
> first. And that means thinking of your guys, too, because
> *they* are the ones watching your back. (Interview 32)

This 15-year veteran explained not only that he would hold his sincere emotions at bay and display the necessary emotional distance but also that part of this strategy was his concern for his safety and the safety of his coworkers, on whose solidarity he counted.

Solidarity

A critical component of both nursing and policing was coworker solidarity. Emotional connections and willing teamwork were emphasized by many interviewees. Below are two representative quotes, one from nursing, one from policing.

This nurse described teamwork and solidarity as essential to handling workplace difficulties, using the word *family* to describe her coworkers:

> It's tough work and we all pull together. Sometimes it gets
> really rough. We might be way understaffed, [face a sudden
> increase in patients, or other similar stressor]. But we're a
> family. We want to help each other—not just because it's our
> job, but we want to be there for each other. (Interview 25)

Similarly, this police officer also used the words *family* and *brotherhood* to describe his coworkers:

> It's hard. It can be just hell . . . [but] I like the brotherhood.
> Everyone I work with is like family. That makes the job
> possible, makes it nice. . . . Once you've done the job, and
> if you have the knack for the job, it's just something that
> you can't give up and you really couldn't go back to doing
> any other kind of job. (Interview 18)

The solidarity the police officer felt with his coworkers helped him weather the difficult aspects of his job and was such a positive counterbalance to the negative parts that he believed it retained many police officers who otherwise might leave the field of policing.

Safety and Solidarity

Solidarity could further safety goals in two ways. First, solidarity directly boosted safety by securing the connectedness among coworkers that complex job situations demand. Second, solidarity indirectly advanced safety goals by enabling the emotional labor necessary to ensure safety.

    In the healthcare setting, nurses' solidarity can lead to greater safety through better-coordinated multi-person care for their patients. For example, this hospital nurse described her unit's ability to work together and take over each other's duties when complications arose:

> We're helping each other out, so if an alarm goes off, it
> doesn't have to be *your* patient. We're all answering the
> alarm; we're all resetting IV pumps for each other. . . . If
> somebody has a kid that's losing their mind, one of us can
> go hold them. I think in all areas of nursing, but
> [especially] where I work, that's something I'm really
> proud of: that we really work well together. As a team we
> help each other out a lot. . . . We're helping each other,
> we're helping each other to keep our patients safe.
> (Interview 23)

She explained how the bonds that she and her coworkers shared promoted effective teamwork and communication to ensure patient safety.

    Conversely, lack of solidarity in the healthcare workplace can jeopardize patient safety. In one interview, a nurse described the difficulties of working with an uncooperative coworker:

> My work [was] hindered because I had to take up a lot of
> her duties because she wouldn't get off the computer. I
> confronted her about it, and she got very put out and
> purposefully didn't help anymore—at all. I was hindered in
> the sense that I had to do a lot more work that I shouldn't
> have had to do. [This could have] created a dangerous
> situation. . . . Our patients need ongoing care. What

> happens if [one of us] isn't there? Someone could die.
> (Interview 1)

In this situation, the nurse explained that in the hospital setting, when nurses refuse to work as a team, not only are coworkers overworked and stressed but patient safety is at risk.

Solidarity is also essential among police officers for navigating potentially dangerous interactions with civilians. While responding to a call, police officers must work in unison to ensure the safety of themselves, their coworkers, and nearby civilians. In the example below, a very disgruntled customer endangered the safety of hotel employees and a group of police officers had to work together effectively and efficiently to safely interact with the mentally unstable civilian:

> I got there first, so I just tried to talk to him, calm him down,
> get him to calm down. [When the] other officers got there,
> [we] tried to make sure [that the] other officers didn't turn
> their sirens on, to [not further agitate] the person more, even
> though [doing so would have been protocol]. If they [had
> come in with sirens blaring], he could have gotten scared
> and then [been] an even greater threat. (Interview 12)

Here, the officer described workplace solidarity contributing to greater safety by heightening officers' coordination of community interventions.

Similarly, the officer quoted below emphasized that working with others always heightened safety:

> Any day, any time, they could overpower [you]. . . . If you
> [would have to] act alone, then you'd be putting yourself at
> risk, in danger. [That's why] you gotta have [other police
> officers] there, too. The other guys are there to help you
> stay safe, and you're there to have their back, too.
> (Interview 14)

This officer believed that any situation could pose substantial risk to his safety. Solidarity with his fellow officers assured him that someone would "have [his] back" and keep him safe.

In addition to these direct effects, solidarity also enabled workers to perform the emotional labor, discussed earlier, that was a necessary first step toward the main goal of keeping people safe. For example, this hospital nurse described how she and her coworkers sometimes needed a break from their patients in order to maintain the necessary level of emotional labor:

> We're here to help. But sometimes [ugh,] I mean, it's just
> hard to open your eyes and see all the crap we have to deal
> with. And you can't yell at [the patients]. That's not what
> we're about, and it wouldn't work anyway. But sometimes,
> I mean, it's like you can't talk to [a problematic patient]

> again. [That's why it's so good that] we work as a team.
> Well, we're not officially teams, but we help each
> other. . . . Like, I'll go in [to talk with] another [nurse's]
> patient, or someone else will cover [my patients] while I
> just have a breather. [After that bit of break,] you can go
> back and be kind and be all smiles and encouraging.
> (Interview 3)

Although the police officer quoted below addresses performing authority rather than warmth like the nurse above describes, both quotes explain how solidarity among coworkers helps them overcome their workplace frustration and display the emotion required for that circumstance.

> You get these men, these young men, who are just going to
> be in your face, and you gotta stay calm and you can't let
> them get to you or get under your skin. [That's when]
> another officer might step in and help you cool down and
> stay calm, maybe just say something to you or just be
> there. . . . [You must] show authority, sure, but not your
> anger. There are times you need [another officer] to just
> help you, remind you, bring you back. . . . You know [the
> fellow officers] get you, get what you're struggling with.
> They're there with you and understand. . . . Then you can
> be in control, but not act angry. (Interview 24)

Indeed, solidarity among nurses and police officers helps them overcome workplace challenges so they can perform the necessary emotional labor needed to maintain safety on their jobs.

DISCUSSION AND CONCLUSIONS

While both nurses and police are concerned with their own safety as well as the safety of those they serve, this article demonstrates variation in the centrality of these various goals within these professions. Both nurses and police described engaging in emotional labor, but with different motivations and different emotion rules. Often, nurses engaged in emotional labor so their charges would feel closer to them. They worked to create feelings of affection and warmth. In contrast, police engaged in emotional labor in order to create distance between themselves and the community members they encountered.

The importance of emotional distance and closeness is confirmed by the extant literature. Research on nursing documents how patients often are more compliant and at ease—states that might facilitate their safety and improved health—when they experience emotional closeness to their healthcare providers (Bakker and Hueven 2006; McQueen 2004). Regarding policing, several studies found that police are more successful in maintaining public order when civilians do not perceive them as emotionally available but

rather harshly distant and authoritative (see Agocs et al. 2015; Bakker and Hueven 2006; Campeau 2015).

Close or emotionally warm nurse-patient interactions facilitated greater success in the nurses' tasks of helping patients to become healthy and safe despite illness, injury, and medical procedures. The patients would be more compliant and more helpful in their treatment and thus would stay safe throughout their visits and get well sooner. Police culture asserts the opposite goal for police officers. Unlike nurses, police in this study believed they should maintain emotional distance from civilians in the community. They believed they were more successful in their tasks of maintaining public order when civilians did not perceive them as emotionally available but rather harshly distant and imposing.

Solidarity and teamwork were critical for both nurses and police in achieving their goals of safety both directly and indirectly. Directly, solidarity among coworkers enabled smooth teamwork at critical times. Indirectly, workplace solidarity facilitated the emotional labor that their jobs often demanded. Worker solidarity was often expressed with feelings of belonging ("like a family" from Interviews 25 and 18).

Extant research has noted high solidarity in the nursing and policing fields (Allen 2014; Campeau 2015; McQueen 2004). In policing, these strong social bonds are initially developed in police training and are maintained throughout the officers' careers (Campeau 2015). In nursing, workplace solidarity can fluctuate between workplaces but often is strongest within hospitals and other institutions that provide 24/7 patient care (Allen 2014; McQueen 2004).

Though emotional labor and worker solidarity in both professions furthered the goals and concerns for greater safety, exactly *whose* safety differed between these two groups. For nurses, their focus was on the safety of their patients: Safe, healthier patients required that nurses exhibit the emotions of compassion and warmth in their interactions to heighten patients' feelings of closeness. In contrast, the police officers' goal was to maintain their own and their coworkers' safety, and only then the safety of community members. Police officers emphasized the emotional labor of authority during their interactions with civilians. Thus, nurses' emotional labor was more focused on protecting outsiders (i.e., their patients), while police officers' emotional labor focused on preserving the safety of occupational insiders (i.e., the officers entering spaces of others in their communities).

Issues of gender were not addressed in this article; however, gender composition of the study should be acknowledged. The gender division in this study—more nurses were women and more police officers were men—reflects the divide in these occupations themselves: More women enter nursing and more men join the police force. An array of gender stereotypes and social norms are thus overlaid onto the work of nurses and police officers. Much extant literature has established that care is a female stereotype (Abel and Nelson 1990; Collins 2020; Damaske 2011; Williams 2000). Many caregiving jobs are or have been predominantly female jobs (Kelly 2005). For this reason, decoupling the nursing occupation's goal of patient care and the gender norm of the caregiving woman can be difficult. Similarly, the overlay of stereotypes of men and men's gender roles is also complicated. The traits of confrontation and authority epitomize masculinity (Coutinho-Sledge 2015; Paechter 2006; Young 2017), yet these both are components of many people's views of police work (Campeau 2015).

Given how tightly coupled are the images of these two occupations and the gender of the work, further investigation into this intersection would be an area that future research might explore more fully.

Like much empirical work, this study had several limitations. Interviewing people regarding intimate emotional experience can be challenging. This might be especially true when those people are being interviewed by student interviewers who are still novices. Interviewees may have been unable to remember or unwilling to communicate various emotional experiences. Additionally, as with any study that asks participants to think back to past experiences, participants might misremember or misrepresent their true emotional experiences. Additionally, interviewees' stated emotional practices might simply be reiterations of explicitly stated employee expectations for each profession. Interviewees may also distort past experiences to reframe their own actions or reactions to seem more honorable or less questionable. Although these issues do not undercut the project, the authors and researchers wish to acknowledge them.

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Between Governance and Markets: An Assessment of Environmental Boundary Organizations

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ABSTRACT

This article considers the genesis, characteristics, and dynamics of boundary organizations as they apply specifically to environmental boundary objects, that is, pieces of science on which policy is reliant. Boundary organizations have been widely discussed since the 1990s but are undertheorized in terms of political concepts; this paper approaches environmental boundary organizations as essentially liberal vehicles of power using Lukes's (1974) definition, in which the liberal dimension of power is divided into (a) eliciting and (b) meeting wants of stakeholders equitably. Environmental boundary organizations are compared and contrasted with single-perspective organizations (that is, organizations beholden to either government or industry) and the failure of single-perspective organizations to bridge the needs of multiple stakeholders insofar as environmental issues are concerned. Case studies of successful boundary organizations, such as the Health Effects Institute (HEI) and California Ocean Science Trust (COST), are utilized to demonstrate how and why well-designed environmental boundary organizations function, with the basis of success being a commitment to multiple parties' interests as represented by a neutral, balanced organization that supports joint agenda-setting, governance, research, and arbitration of knowledge. The findings support the claim that environmental boundary organizations are highly effective, sitting as they do between the needs of governance and the market, and the details provided in the case studies provide a convenient summarization of how such organizations should be approached and structured for maximum benefit to all parties.

KEY WORDS Boundary Organizations; Environmental Policy; Science-Policy Interface; Stakeholder Engagement; Agenda-Setting

THE ORIGIN OF THE BOUNDARY ORGANIZATION CONCEPT

Boundary organizations have received substantial scholarly attention (Carr and Wilkinson 2005; Cash 2001; Guston 2001; Miller 2001; O'Mahony and Bechky 2008; Parker and

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Crona 2012; Schneider 2009; Star and Griesemer 1989). Although there is no consensus in the existing literature on exactly when boundary organizations first came into being, Star and Griesemer (1989) have made a compelling argument that the emergence of museums in the 17th century represents one of the first times that institutions had to balance the interests of producers and consumers of scientific research in a manner characteristic of Guston's (2001) general definition of the boundary organization.

Star and Griesemer's (1989) article was among the first rigorous explorations of the boundary organization concept, albeit situated very specifically in the context of American natural history museums, and it departed significantly from previous theoretical models of how a boundary object—that is, a research product that can be utilized for different reasons by scientists, politicians, and the public—is institutionally managed. In contrast to their own theoretical approach, Star and Griesemer described what they called the Callon-Latour-Law model, in which boundary objects are ultimately managed in a manner that privileges a single stakeholder, such as either a scientific organization or a governmental branch. Star and Griesemer subsequently distinguished this older managerial model from a true boundary organization in which "several obligatory points of passage are negotiated with several kinds of allies" (Star and Griesemer 1989:390).

Guston (2001) built on this idea and noted that the true boundary organization represents the interests of different audiences in a more balanced and federalized manner than is the case in the Callon-Latour-Law model. In this context, Guston (2001:405) offered an admirably simple explanation of the boundary organization:

> To the scientific principal, it says, "I will do your bidding by demonstrating to the politicians that you are contributing to their goals, and I will help facilitate some research goals besides." To the consumer, who is also a principal, it says, "I will do your bidding by assuring that researchers are contributing to the goals you have for the integrity and productivity of research." The boundary organization thus gives both the producers and the consumers of research an opportunity to construct the boundary between their enterprises in a way favorable to their own perspectives . . . [thus balancing] interests to reduce the threat that either side will find the boundary organization inimical, because it will actually pursue the interests of both parties.

The boundary organization can therefore be succinctly defined as an institution that reflects input from multiple stakeholders (typically, in the classic model, a scientific stakeholder and a governmental stakeholder) in order to manage boundary objects in a federalized manner that serves multiple interests simultaneously. Star and Griesemer believe that the modern natural history museum is a boundary organization par excellence, but, based on the more generalized definition offered by Guston, any organization that simultaneously supports scientific and governmental interests can be described as a boundary organization.

The word *boundary* has a special connotation with respect to boundary organizations in that, according to Gieryn (1999), this boundary is specifically between science and politics. The point made by Gieryn (1999), Guston (2001), and Star and Griesemer (1989) in slightly different contexts is that scientific research produces objects that can be, and are, consumed by government after they are produced by science. Understood from this perspective, a boundary organization also sits between the interests of scientific producers (i.e., researchers) and government consumers of that research in a manner that is supposed to defend the integrity of science while also respecting the right of government to utilize and benefit from this research in particular ways.

Star and Griesemer noted that, in the Callon-Latour-Law model, the alternative to the true boundary organization was an organization that privileged a single stakeholder (i.e., either a scientific or a governmental institution). Guston (2001) then noted the theoretical superiority of the boundary organization model, which, unlike a Callon-Latour-Law organization, had genuine value to provide to different stakeholders. In Guston's account, boundary organizations are both classically liberal and utilitarian, the existential rationales for such organizations. In Lukes's (1974) political taxonomy, the liberal dimension of power is based on finding out what people want and giving it to them, and from a utilitarian perspective, the success of any such liberal exercise of power is how much total value it producers for stakeholders. From this perspective, according to Guston, boundary organizations are successful when they are able to (1) elicit what the interests of scientific and governmental stakeholders are and (2) deliver on these interests in a manner that comes close to maximizing the expressed wants of both sides.

THE SPECIAL ROLE OF THE ENVIRONMENT

The environment plays a special role as far as boundary objects and organizations are concerned, for the reasons elucidated by Jasanoff (1987). First, many kinds of science focus on the environment from perspectives such as ecology, biology, climatology, chemistry, physics, and the like. The environment has historically been a domain of immense interest to multiple branches of science. Second, and more relevantly for the issue of boundary organizations, there is a nexus between policy and the environment. The environment is therefore a classic example of a domain combining what Jasanoff described as policy-relevant science and science-dependent policy.

In the context of the environment, the classic boundary objects are items of scientific knowledge that inform or influence policy in some way. Jasanoff (1987) gives the example of findings related to carcinogens. A scientific finding that asbestos causes cancer is, of course, of intrinsic interest to scientists as the end product of a scientific investigation, but it is equally compelling to policymakers who have to decide whether and how to integrate this knowledge into governance, such as by banning or regulating asbestos. One of Jasanoff's key contributions to the literature on boundary objects and organizations was to emphasize that knowledge, as a boundary object, is constructed, deconstructed, and reconstructed in complex and interest-dependent ways. In other words, it is not merely the case that scientific knowledge itself is constructed and emerges subjectively, that is, in a manner that reflects the power of specific scientific journals and

the prevailing paradigms and power alignments in science; it is also true that, once the scientific object solidifies, it is deconstructed and reconstructed in content-dependent pragmatic ways by different parties. As Jasanoff (1987:195) summarizes,

> The processes of deconstructing and reconstructing
> knowledge claims give rise to competition among
> scientists, public officials and political interest groups,
> all of whom have a stake in determining how policy-
> relevant science should be interpreted and by whom. All
> of these actors use boundary-defining language in order
> to distinguish between science and policy, and to allocate
> the right to interpret science in ways that further their
> own interests.

The focus of Jasanoff's (1987) article was on how the construction, deconstruction, and reconstruction of knowledge are what is at stake in boundary organizations, with contingent opportunities for both cooperation and competition between different actors depending on a host of variables, such as the electoral bases that policymakers are trying to appeal to, levels of activism among scientists, and degrees of power institutionally or informally allocated to different participants in a boundary organization. Jasanoff's article is important for primarily two reasons: (1) the identification of the environment as a key domain for boundary organizations, given that the environment is replete with examples of policy-relevant science and science-dependent policy, and (2) the discussion of knowledge construction, deconstruction, and reconstruction processes as being key dynamics governing how well, and to what ends, boundary organizations work. The article is not as sweeping as the seminal work of Star and Griesemer (1989) in examining the various levels at which boundary organizations are supposed to work, but its joint emphases on the environment and knowledge processes are useful perspectives to apply to any discussion of boundary organizations operating in the environmental domain.

GUIDING QUESTIONS

With this framework in mind, and having discussed the special role of the environment in the context of boundary objects and organizations, it is possible to take up the question of whether environmental boundary organizations are effective responses to the failures of alternative responses to managing boundary objects. This question can be usefully situated in the key literature on boundary organizations. In particular, the question should be understood in terms of what Star and Griesemer defined as a Callon-Latour-Law type of organization, which is designed to facilitate the interests of either a scientific or a governmental institution. The question can then become, To what extent have single-perspective attempts at managing environmental boundary objects failed? Single-perspective attempts can, in this context, be understood as solely market-oriented, science-oriented, or policy-oriented.

With the question having been refined, the theme of failure can then be considered more closely in light of what Guston (2001) described as the liberal and utilitarian dimensions of the true boundary organization. The underlying question informing the literature review can then be refined in the following ways:

- Q1: Have single-perspective attempts at managing environmental boundary objects failed because they have not successfully *elicited* the wants of both scientific and governmental stakeholders? If so, how and why has this kind of failure come about, and how do boundary organizations reflect a potential improvement?
- Q2: Have single-perspective attempts at managing environmental boundary objects failed because they have not successfully *delivered* the wants of both scientific and governmental stakeholders? If so, how and why has this kind of failure come about, and how do boundary organizations reflect a potential improvement?

ELICITING WANTS

Star and Griesemer (1989) and Guston (2001) emphasized that, once a boundary object is created, different stakeholders will have different wants vis-à-vis that boundary object. Guston noted that, in many cases, scientists or scientific organizations will want to continue adding to a research object; they will also want their creation of this object to be explicitly recognized by government so that, for example, they can satisfy funding conditions and continue generating budgetary and other forms of support. In considering environmental organizations (both boundary and non-boundary organizations), it is therefore appropriate to examine the rationale for boundary organizations by asking whether they have done better than single-perspective organizations in eliciting the wants of both scientific and governmental stakeholders. As part of this want-eliciting evaluation, the particular reasons for the relative success of boundary organization can also be considered.

The want-eliciting characteristics of single-perspective as well as boundary organizations can be considered from the perspective of ocean industries. An example of a single-perspective organization that reflects government interests is the United Nations (UN), particularly in the context of the United Nations Convention on the Law of the Sea (UNCLOS). UNCLOS created a definition of exclusive economic zones (EEZs) that coastal nations can exploit, but, in eliciting wants regarding this law, it communicated only with member states, not with stakeholders such as scientific organizations, private-sector organizations, or the general public (Egede 2023). A single-perspective organization representing market interests is the World Ocean Council (WOC), which, when eliciting wants for its own agenda, obtained input from companies in the ocean industries, not from governments, scientific organizations, or the public (Voyer et al. 2018). These approaches are in contrast to that of a boundary organization, the California Ocean Science Trust (COST), which, in its want-eliciting process, reached out to the government of the state of California, climate and ocean scientists, and even the general public (Lowell et al. 2012)—the last of which is a particularly important function of boundary organizations that has not

been widely discussed in the literature. Through outreach programs, educational initiatives, and transparent communication of scientific findings, COST also ensures that the public is aware of and involved in ocean governance (Lowell et al. 2012). Such inclusive public involvement contrasts with the often limited public-engagement efforts of single-perspective organizations, which may focus more narrowly on the interests of their primary stakeholders; after all, neither WOC (Voyer et al. 2018) nor UNCLOS (Egede 2023) has had input from the public.

In theoretical terms, eliciting wants can be described as a matter of agenda-setting, which, in turn, can be understood in terms of principals and agents. Close alignment between the principal and the agent, as is typically the case in single-perspective organizations, is the reason why such organizations elicit a limited set of wants. For example, the principals of WOC are private-sector companies involved in oceanic industries, such as multinational fishing companies, and the agents of WOC are either drawn from the cadres of such companies or beholden to such companies, as WOC exists only because it is funded by companies (Voyer et al. 2018). It is therefore logical to expect that the WOC agenda will be aligned primarily with the interests of maritime companies and only secondarily, if at all, with the interests of scientists, governments, and the public.

By contrast, boundary organizations by definition have more than one set of principals; at a minimum, such organizations must have at least one government agency and at least one scientific institution as principals. Often, the agents of boundary organizations are themselves drawn from these two groups of principals so that, for example, agenda-setting necessarily reflects the wants of these two groups. Even if agents are professional managers rather than representatives of a scientific or governmental group, the nature of a boundary organization is such that agenda-setting is formally encoded into processes. This point was made in detail by Star and Griemer (1989) in their description of how the governance of Berkeley's Museum of Vertebrate Zoology included a highly detailed discussion of how to elicit agenda items from the museum's scientific as well as governmental stakeholders. Star and Griemer went on to note that this detailed and explicit approach to agenda-setting has been widely adopted, so that modern boundary organizations are formally set up to be able to elicit agenda items from all stakeholders. Indeed, according to Star and Griemer, this approach is what makes a boundary organization a boundary organization; otherwise, the organization would become a single-perspective organization following what Star and Griemer called the Callon-Latour-Law model.

In a detailed case study of a boundary organization, Klerkx and Leeuwis (2008) made the point that boundary organizations can best be understood in terms of networks, with these networks including multiple decision-making agents who, in the distributed power structure characteristic of the boundary organization, have equal or at least similar power over different agenda items. These authors emphasize that the issue is complex insofar as there are also multiple agenda types within a boundary organization; for example, the selection of a research focus could be an agenda item on which the scientific component of the organization has more influence, whereas items on the funding agenda would be more in the domain of government—as was the case in Klerkx and Leeuwis's case study; however, the larger point remains: The very nature of a boundary organization is better designed for eliciting wants from both the scientific and governmental components

of the organization, whereas a single-perspective organization remains vulnerable to the agenda-setting dominance of a single stakeholder group, which, as Voyer et al. (2018) noted in the case of WOC, ensures that agents act on behalf of its interests.

Additional examples of the want-eliciting advantages of environmental boundary organizations abound. In the late 1970s, the Environmental Protection Agency (EPA) in the United States made efforts to establish emissions standards and ambient air quality, efforts that were met with resistance from the auto industry, highlighting a contentious relationship between governmental and commercial priorities. The landmark 1977 Clean Air Act Amendments introduced new regulations, requiring the auto industry to scientifically prove that their parts did not harm the environment. The EPA did not trust the industry's research efforts, however, and the industry was reluctant to defer to the EPA's impartiality (Guston and Clark 2000:14). This adversarial stance reflected the limitations of single-perspective approaches in effectively eliciting the wants of both stakeholders.

Recognizing the need for a collaborative approach, Chuck Powers, Vice President and Chief Environmental Officer of Cummins Engines, and Michael Walsh, EPA Deputy Assistant Administrator, established the Health Effects Institute (HEI). This boundary organization was designed to address the demands of the EPA while considering the operational realities of the auto industry. By creating a neutral ground for dialogue, the HEI aimed to elicit the wants of both the EPA and the auto industry, fostering a cooperative environment in which both parties could work toward common goals (Guston and Clark 2000:14).

The HEI's structure allowed it to balance the interests of the scientific and industrial stakeholders. It facilitated open communication and negotiation, ensuring that both sides could voice their concerns and set agendas collaboratively. This process was essential for eliciting the wants of both the EPA, which sought stringent regulatory compliance, and the auto industry, which needed feasible implementation strategies. By involving both parties in the decision-making process, the HEI exemplified how boundary organizations could effectively elicit and integrate diverse stakeholder interests, reducing tensions and promoting cooperation.

This case illustrates the importance of boundary organizations in overcoming the challenges of single-perspective approaches. The HEI's success in eliciting wants from both the EPA and the auto industry underscores the value of collaborative frameworks in addressing complex regulatory issues. By balancing the needs and goals of different stakeholders, the HEI demonstrated how boundary organizations could facilitate more effective and harmonious interactions between regulatory bodies and industry players, leading to mutually beneficial outcomes.

The EPA case study should, however, also be understood in terms of Jasanoff's (1987) comments about knowledge contestation as part of the processes common in environmental boundary organizations. Ultimately, the HEI successfully bridged the distance between the EPA and the automotive industry, but this process involved what Jasanoff has described as the interest-motivated deconstruction and reconstruction of knowledge. For example, the EPA argued that catalytic converters were a proven technology that could significantly reduce harmful emissions (citing studies showing that these devices could cut emissions of carbon monoxide, hydrocarbons, and nitrogen oxides

by up to 90%), whereas the automotive industry-sponsored studies concluded that catalytic converters were not yet reliable enough for mass production. The EPA advocated for the reduction of lead in gasoline, citing research linking lead exposure to severe health issues, particularly in children, whereas the auto industry's studies argued that removing lead from gasoline would decrease engine performance and increase wear and tear, leading to higher maintenance costs. Finally, drawing on data from independent testing laboratories, the EPA maintained that stringent emissions testing and standards were essential to ensure compliance and achieve the desired reduction in air pollution, whereas industry studies criticized the EPA's testing procedures as unrealistic and not reflective of real-world driving conditions.

As a boundary organization, the HEI overcame some of the issues related to knowledge contestation by involving both the EPA and the automotive industry in agenda-setting, creating a framework for jointly sponsored rather than adversarial research, and serving as a neutral and trusted evaluator of evidence independent of both the EPA and the automotive industry. These were the aspects of the HEI boundary organization that enabled its success, and they can all be understood in terms of how well HEI overcame the knowledge-contestation problems that, according to Jasanoff, plague environmental boundary objects and prevent the success of boundary organizations. These factors can also be understood under the heading of eliciting wants because joint agenda-setting allowed both sides to express their wants, joint research allowed these wants to be embedded in the process of knowledge construction, and the neutrality of the HEI provided a trustworthy forum within which wants could be evaluated and interpreted. This case study suggests that, if wants are elicited in a manner that bridges differences (especially as related to knowledge contestation), then the process of meeting wants is relatively straightforward, because the organic end product of the boundary organization's functioning is the creation of a want list on which all involved parties agree.

MEETING WANTS

Eliciting wants is, according to Lukes (1974), among the first things any nonauthoritarian organization does when it is framing its mission, strategy, and tactics. Eliciting wants is only the first step in organizational function, however; such wants, once elicited, must also be delivered to the respective stakeholders of an organization. Having considered both single-perspective organizations and boundary organizations from the basis of want-eliciting, it remains to be explored how well both of these organizational types have done at meeting wants.

In the context of the world's oceans, it is clear that single-perspective organizations have met the wants of their primary stakeholders. For example, although most of the world's governments have either mandatory or suggested pollution-mitigation practices in place for private-sector organizations that affect the ocean, a recent survey indicated that only 44% of companies involved in the global ocean economy actually take pollution-mitigating steps and only around 1 in 4 of such companies has a corporate social-responsibility stance with respect to their impacts on the ocean (Sardá et al. 2023). These statistics constitute some evidence that the wants of private companies—that is, to

minimize the expenses of pollution-mitigating corporate social responsibility while maximizing their use of the oceans—have received preference over the wants of governments. Moreover, these statistics also reinforce the conclusion that the WOC and similar single-perspective organizations designed to promote the rights of private-sector companies have not succeeded in meeting governmental wants related to pollution reduction (Voyer et al. 2018).

The same kind of point can be made in reverse when considering how single-perspective organizations prioritizing governments have delivered on the wants of stakeholders. For example, UNCLOS has, in its definition of EEZs, severely hurt the fishing economies of African countries:

> The rights of landlocked states are limited to the excess of the allowable catch of living resources in the same subregion or region's EEZs as determined by coastal States. Africa has 16 landlocked States. . . . No African States have entered into any agreements to allow their neighbouring landlocked and geographically disadvantaged States to exploit living resources in their EEZs. (Egede 2023)

A single-perspective organization (in this case, the UN) thus has not delivered on the wants of landlocked African countries vis-à-vis their fishing industries. When the private sector generates organizations—such as the WOC—to manage commercial activity, the wants of organizations are privileged over the wants of governments (Voyer et al. 2018). In the case of UNCLOS, the wants of coastal state governments are prioritized over the wants of the fishing industries of landlocked African nations (Egede 2023).

Boundary organizations have demonstrated the potential to better balance the interests of science and government as they pertain to the oceans. For example, COST organizations can meet the wants of diverse stakeholders more effectively than can single-perspective organizations (Lowell et al. 2012). Unlike WOC, which primarily advocates for the interests of private-sector companies, COST bridges the gap between science and policy. For governments, COST aids in the development of evidence-based regulations and management strategies for ocean resources, balancing environmental protection with economic considerations (Lowell et al. 2012). As a result, the wants of government and businesses vis-à-vis the ocean are better balanced (Lowell et al. 2012).

Also in contrast to COST, UNCLOS has faced challenges in balancing the wants of different stakeholders (Egede 2023). Its focus on the rights of coastal states has led to unintended negative impacts on the fishing economies of landlocked African countries, demonstrating how a single-perspective approach can fail to address the broader needs of all affected parties (Egede 2023). A boundary organization such as COST is better positioned to meet the wants of multiple stakeholders (Sardá et al. 2023).

The HEI also offers an example of a boundary organization doing better at meeting wants. The HEI's mandate was to produce independent scientific research that could be trusted by both the EPA and the auto industry, succeeding in what Jasanoff (1987) identified as the critical domain of smoothing over knowledge contestation. By doing so,

it met the EPA's need for credible evidence that automotive emissions controls were effective, while also addressing the industry's desire for feasible and cost-effective compliance solutions. This dual focus ensured that the research outcomes were relevant and actionable for both stakeholders (Guston and Clark 2000:14). One of the key ways in which the HEI met the wants of its stakeholders was by creating a framework where both the industry and the EPA could collaborate on research projects. This collaborative approach ensured that the research conducted was aligned with the regulatory standards required by the EPA and the practical constraints faced by the industry. By involving representatives from both sides in the research process, the HEI was able to produce findings that were both scientifically rigorous and practically applicable, thus meeting the needs of both parties (Guston and Clark 2000:14).

COUNTEREXAMPLE

Jasanoff's (1982) article is of interest because it discusses how a single-perspective approach, that of the Occupational Safety and Health Administration (OSHA) with respect to late-1970s/early-1980s carcinogen policy, was inefficient and failed to equitably elicit and meet the needs of stakeholders. This case can serve as a contrast to HEI, with HEI's success illustrating what a boundary organization can add that OSHA, a single-perspective organization, did not.

Jasanoff (1982) summarized OSHA's carcinogen policy as a failure because the policy (1) was contested vigorously in court by industry; (2) stipulated stringent criteria established for evaluating scientific evidence, such as epidemiological studies and high-dose animal tests, that were often impractical and impossible to meet; (3) failed to build a consensus among the scientific community and other stakeholders; (4) resulted in administrative inefficiency because of procedural complexity and inflexibility, partly because of its attempt to create generic rules that did not account for the nuances and evolving nature of scientific knowledge about carcinogens; (5) failed to address the economic realities faced by the regulated industries; and (6) established overly rigid criteria for accepting scientific evidence that failed to integrate knowledge from new scientific discoveries or advancements, thus "freezing science."

What the case studies of HEI and COST demonstrate is that boundary organizations could have done better than OSHA because of (1) inclusive agenda-setting that could have involved both scientific experts and industry representatives in setting the agenda for carcinogen regulation, (2) the facilitation of collaborative research between stakeholders, (3) neutral evaluation of evidence that would have helped the "freezing of science" problem faced by OSHA, (4) building trust among stakeholders, and (5) supporting policy flexibility and responsiveness. In these ways, well-run environmental boundary organizations would have addressed many of the shortcomings of OSHA's carcinogen policy, leading to more effective regulation that was simultaneously scientifically sound, economically feasible, and broadly supported by all key stakeholders.

DISCUSSION AND CONCLUSION

The previous sections of the literature review seem to support the hypothesis that boundary organizations exist in the space between policy and science. Indeed, scholars tend to define boundary organizations on this basis; a boundary organization must be interstitial (Carr and Wilkinson 2005; Cash 2001; Guston 2001; Howells 2006; Miller 2001; O'Mahony and Bechky 2008; Parker and Crona 2012; Pham et al. 2010; Schneider 2009; Zald 2008). This aspect of boundary organizations requires further interrogation. Given that boundary organizations require substantial investment of time, money, and intellectual resources to create, the question becomes why so many boundary organizations have appeared over the past several decades.

The answer to this question appears to be that boundary organizations ultimately address problems that are not adequately resolved by governance/policy alone or by markets alone. The preceding discussion of boundary organizations has offered some case study examples of how boundary organizations are able to exist within the gap between markets and governance; however, it remains to give a more formal account of why stakeholders on either side of the boundary would want to support the existence and operation of boundary organizations.

In the domain of the environment in particular, a key consideration is that, once a boundary object (such as a scientific finding) is generated, it is likely to be relevant to policy, and policymakers are often going to want to act on it somehow (Jasanoff 1987). In this process, the key need that policymakers have for scientists is justification, because, as Jasanoff noted, policymakers have a vested interest in showing that their policies are somehow rooted in science. The prestige and reliability of science remain desirable supports for policymakers, and if a policy is critiqued or unpopular, science also provides a cover, as policymakers can claim that they were just following the science (Jasanoff 1987). Meanwhile, scientists want funding from policymakers, and they also want to maintain their own cognitive prestige by driving actions based on the knowledge they have generated (Jasanoff 1987); therefore, as Jasanoff noted in one of the earlier articles on boundary organizations and the environment, there is already a structure in place for a symbiotic relationship between policymakers and scientists in the environmental domain. This symbiosis can be, and has been, embodied in the form of boundary organizations, and what becomes more relevant subsequently is to explain how particular environmental boundary organizations can thrive and can benefit their constituent stakeholders.

The framework of needs-eliciting and needs-meeting—which are themselves organic byproducts of boundary organizations that build power-sharing into agenda-setting, leader selection, and organizational bylaws—helps to explain the success of environmental boundary organizations such as HEI and COST. For stakeholders, the good news is that there are built-in reasons for wanting to support boundary organizations, as well as built-in reasons for such organizations to be efficient and successful, because, as Jasanoff (1987) summarized, scientists and policymakers need each for specific and compelling reasons. This need is, in turn, an organic driver for stakeholders' contributions to, or simply acceptance of, boundary organizations designed to serve their joint needs.

In conclusion, environmental boundary organizations can be situated ideally between governance and markets, effectively addressing the limitations of single-perspective approaches such as those of OSHA or WOC. Environmental boundary organizations can promote inclusivity, adaptability, and collaborative decision-making, all of which are particularly necessary in environmental contexts. HEI and COST have, as successful boundary organizations, efficiently combined policy and science interests by fostering trust and cooperation. Unlike OSHA's carcinogen policy, which struggled with rigid criteria, administrative inefficiency, and stakeholder discord, good boundary organizations are designed to elicit and meet the needs of all parties involved. They achieve this through inclusive agenda-setting, collaborative research initiatives, and neutral evaluation of evidence, thus ensuring policies that are scientifically robust, economically viable, and broadly supported.

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Missing Spies and Political Murder: The FBI and the Construction of Crime

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ABSTRACT

Juliet Stuart Poyntz disappeared in June 1937 from Manhattan, New York. She was never seen again. The disappearance was not reported until December, and the police did not begin a formal investigation until January 1938. Sick from lupus, without her prescriptions, the 50-year-old Poyntz was likely already dead, but her friends did not believe it was because of her untreated disease; they believed it was more likely the Soviet secret police had killed her. One friend in particular, anarchist Carlo Tresca, was very loud in accusing the Soviet Union of Poyntz's abduction and murder. Tresca gave a press statement, testified before a grand jury, and spent the remainder of his life, which ended by an assassin's bullet in 1943, claiming that communists had had his friend Juliet kidnapped and murdered. With the United States' history of dogged and determined anticommunism, and its particularly fraught relationship with the Soviet Union, the presumption would be that federal intelligence agencies would have taken Poyntz's alleged kidnapping and murder by a foreign power seriously and begun an investigation, but that did not happen.

Explicating the history of the FBI using its own files demonstrates that the files are a better record of the bureau's interests than they are of the people who were being monitored. When a communist conspiracy fomented by a foreign power was alleged to have happened on American shores, the FBI was not interested, but when anticommunism gained the bureau political capital and the ability to expand its surveillance powers, Poyntz's disappearance became a useful tool. For the FBI, enemies were made, based on public and official opinion and on the director's prejudices. The bureau was not a neutral arbiter of justice; rather, it served as a unit that defined crime, criminality, and criminals according to its own standards and the historical imperatives of the time period.

KEY WORDS Spies; Murder; FBI; Anticommunism; Surveillance

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On December 17, 1937, the *New York World-Telegram* reported that Juliet Stuart Poyntz had not been seen since early June. Though she had been missing for more than six months, reporter Arthur Irwin stated that the police had only just been informed of her disappearance. Juliet lived at the American Woman's Association Clubhouse in Manhattan, New York, only a block away from Central Park, and the telephone operators there remembered that she regularly received calls from a man with a deep voice. Sometime in early June after one of these phone calls, she left the building and walked in the direction of the park. She was never seen again. After two weeks and a missing rent payment, the building manager, Mr. Thackerberry, called Poyntz's emergency contact, Marie B. MacDonald, who then contacted her lawyer and friend, Elias Lieberman. The two found Poyntz's prescription medications left in her room; she had lupus and depended on the medication to control her illness. They also found bank account information, her passport, and open containers of food. It appeared that she had expected to return.[1]

Although MacDonald and Lieberman were concerned about their friend, they did not report her disappearance right away. The reason was that both knew Poyntz was a spy for the Soviet underground; she operated in New York as an anti-Nazi agent. A Communist Party (CPUSA) member since 1919, Poyntz had gone underground in 1934 and operated as a recruiter trying to convince individuals to work as spies in Nazi Germany. Her job was to connect willing people with agents in Europe who would collect information from them. The information the communists wanted focused on industrial production in Germany and what designs the Germans had for invading other countries, particularly the Soviet Union. This work meant that Poyntz was away for months at a time.[2]

Developments in the Soviet Union increased MacDonald's concerns about her friend, and she claimed that she had urged Lieberman to report the disappearance but he had counseled patience. That year was the height of Stalin's purges. In 1936, enemies of Soviet Premier Josef Stalin were put on trial in what scholars have described as show trials because the individuals, all leading figures in the Soviet Communist Party, made forced confessions and were executed for their crimes. Then in 1937, Soviet politicos and spies began disappearing in June, the last time Poyntz was seen. On the 20th, Alexander Barmine, Soviet *chargé d'affaires* in Greece, disappeared, before reappearing in Paris and later moving to New York. Barmine had been warned to leave by the man assigned to assassinate him. That man, Walter Krivitsky, was ordered to return to Moscow; instead, he too defected to the United States and began informing authorities about Soviet spying. There were others who went missing, and some who turned up dead. MacDonald feared that Poyntz was one of those victims.[3]

Federal Bureau of Investigation (FBI) agents suspected that it was Thackerberry who revealed Poyntz's disappearance. He had mentioned it to a friend who happened to be a police officer; days later, the news appeared in the press. After the *New York World-Telegram* article, Carlo Tresca, an anarchist and anti-Stalinist, began accusing the Soviets of having Poyntz killed. Tresca had known Poyntz in the 1920s when he had actively worked with communists, but he had begun to mistrust those in the CPUSA. He was critical of Stalin's leadership, and he came to believe that U.S. communists were Soviet agents. He was part of a group of individuals, many of whom had friends in the CPUSA, who increasingly criticized the Party and the Soviet Union. Scholars have come to refer to them

as anti-Stalinists. Tresca named a notorious Soviet agent by the name of George Mink as the likely trigger man in Poyntz's suspected abduction and murder. In February 1938, Tresca gave a press statement and testified before a grand jury about his suspicions. He also contacted the FBI and insisted that the bureau open an investigation, which it did not do. He would spend the remainder of his life, which ended by an assassin's bullet in 1943, claiming that communists had had his friend Juliet kidnapped and murdered.[4]

The Poyntz disappearance provides unique insight into U.S. intelligence history. With the United States' history of dogged and determined anticommunism and its particularly fraught relationship with the Soviet Union, the presumption would be that federal intelligence agencies would have taken Poyntz's alleged kidnapping and murder by a foreign communist power seriously and would have begun an investigation. This disregard of Poyntz's disappearance makes sense when we understand that the FBI has not operated and does not operate as a neutral, objective arbiter of justice. It is a political institution that identifies enemies based on its priorities, and those enemies have primarily been left-wing activists.

This is especially true under the long tenure of J. Edgar Hoover, who prioritized focusing on activists in the Black Freedom Struggle, peace, and other organizations seeking the expansion of democratic rights. This has become more obvious with recent reports that indicate the bureau has fallen short in monitoring and identifying right-wing terrorists within the United States. As Beverly Gage argues, J. Edgar Hoover's personal beliefs were often "at odds" with his "professional obligations." He frequently abused his power and used secrecy to limit political demands of oppressed groups or their allies, like those in the Communist Party. Even within the bureau, those who urged the agency's hierarchy to turn its attention to right-wing extremism often went ignored. This has meant that the agency has fallen short in stemming the tide of right-wing violence.[5]

Studying the FBI's involvement in the Poyntz case presents a paradox. To understand the bureau and why it chose not to investigate the disappearance requires depending on the FBI to be forthcoming with its own documentation. The Freedom of Information Act (FOIA), passed in 1967, was meant to bring transparency to the government's operations, but it is up to the agency to release its own files, something it has not always been willing to do. Recently, the bureau has been releasing partial files; files that were once released in their entirety are no longer available.[6] This is true of the Poyntz file, which was originally released to historian Harvey Klehr in 1978 and is more than 330 pages. The FBI is no longer releasing the file to researchers. This paper uses what is presumably the entire Poyntz FBI file, located in a serendipitous discovery in the archives; a copy of it was found in the Harvey Klehr manuscript collection held at Emory University. The bureau's silence is both troubling and interesting, raising questions about what gaps exist in the documentary evidence, what we don't know, and what the bureau does not want us to know.[7]

The bureau under J. Edgar Hoover's leadership was an anticommunist institution invested in locating and subverting a supposed communist conspiracy. Gage has argued that it would be more appropriate to describe the anticommunist period often referred to as McCarthyism as Hooverism, as it was Hoover who engineered anticommunist purges, created his career on the foundation of an alleged communist conspiracy within the United

States, and believed that behind most social justice activists were Soviets using them as puppets. More important, *Hooverism* describes a much longer trajectory in U.S. anticommunism, spanning Hoover's entire career with the FBI (1924–1972), thus making it possible to understand Poyntz's disappearance as part of anticommunist resistance within the bureau.[8]

     This paper argues that Poyntz's file reveals that, in 1937, when she disappeared, the bureau was not worried about a missing communist but by the Cold War, the newly empowered agency used Poyntz's disappearance to locate communists once associated with her. In other words, the FBI was not worried about Poyntz but was using her to find others associated with communism. Poyntz became a tool in the bureau's hunt for communist subversion. For the FBI, enemies were made based on public and official opinion, based on the director's prejudices, and based on government priorities. Enemies came to be defined by virtue of being under investigation. The bureau was not a neutral arbiter of justice; rather, it served as a unit that defined crime, criminality, and criminals according to its own standards and the historical imperatives of the era.

THE BUREAU

The Bureau of Investigation, as it was originally called, was founded in 1908, initially inspired by the assassination of William McKinley by the alleged anarchist Leon Czolgosz, but its first job was enforcement of the Mann Act to prevent what was then known as the white slave trade in women. The history on the bureau's own website lists anarchists bent on taking over governments as some of its first targets. The site also notes that after WWI, the bureau focused on the anarchists responsible for a series of bombs that eventually launched the Palmer Raids. The narrative surrounding Czolgosz and the assumption that the bombers were anarchists are both highly contested among historians, but the bureau's own history embraces its early antiradical mission.[9]

     Rhodri Jeffries-Jones argues that in the years between 1924 and 1939, Harlan Fiske Stone, attorney general under Calvin Coolidge, sought to reform the infant agency. He advocated a strong central government, but he was wary of political corruption. Under his direction, Bureau Director William J. Burns resigned. Stone sought a nonpartisan organization with legally trained gentlemen as agents; he thought the young J. Edgar Hoover could be the person to implement his ideas, and Hoover was appointed director. The bureau stopped its "political investigations" of organizations like the NAACP and the ACLU, though Hoover still encouraged the filing of informer reports. Though liberal organizations like the NAACP and ACLU adopted anticommunism and would later purge communists from their leadership, Hoover was not dissuaded and still believed that social justice organizations were arms of a Soviet conspiracy.[10]

     The bureau file on Carlo Tresca began in these early years. Tresca, an Italian anarchist, a leading organizer of the International Workers of the World union, and a vocal anti-Stalinist, was monitored closely by the bureau between the years 1922 and 1929, but then his file is silent from 1929 to 1941, which includes the crucial years of Poyntz's disappearance. Bureau agents, neither trained in nor interested in political nuance, described Tresca as a communist subversive. These agents described him as a troublemaker

and political operative of interest, despite his growing disillusionment with communists, his stated anti-Stalinism and criticism of communists, and his organizational independence. Though Tresca shared anticommunist sentiment with the bureau, the agency dismissed him as a radical agitator and did not take him seriously. The silences in the files during the Depression decade can be explained by the official instructions to the bureau to cease collecting noncriminal information on private individuals.[11]

Athan Theoharis argues that in the 1920s, American counterintelligence operated under the assumption that American communists were under the Soviet Union's authority, and it monitored radicals with that assumption in mind. Even after 1933, when the United States formally recognized the Soviet Union, American communists were believed to be under its control. The Depression decade was a period of growth for the American left as capitalism buckled under economic pressures and appeared to be failing, but just as radical organizations drew in membership looking for solutions to the capitalist crisis, the Soviet Union under the dictatorship of Josef Stalin experienced political tumult. Starting in 1934, and accelerating in the years between 1936 and 1938, Stalin fomented internal divisions that led to the purging of several Bolshevik leaders, leading to debate and division in the American left among those who saw Stalin's purges as the death knell of communism. At the same time, the rise of fascist dictators in Italy, Germany, and Spain, and their commitment to authoritarian regimes, led to still more people drawn to the left. The year 1937 was a crucial one; American radicals were debating among themselves the role the Soviet Union should have in the global anticapitalist movement as the purges picked up pace, and they watched the spread of fascism across the European continent with fear. The year was punctuated by the disappearance of Soviet spies outside Russian borders and finally within the borders of the United States with the reported disappearance of Juliet Stuart Poyntz.[12]

Under Franklin Roosevelt, Homer Cummings became attorney general, and he brought a new focus on expanding federal law enforcement to conduct a "war on crime." This included abduction cases. Before Roosevelt became president, the kidnap and murder of Charles Lindbergh's son led to attention on the federal role in solving crimes and the passage of the Lindbergh law. The law allowed the bureau to intervene in kidnapping cases that occurred across state lines. Cummings was an advocate for federal law enforcement, and though he publicly claimed to be invested in states' rights, he was simultaneously expanding the reach of the government in local crime. In 1935, the bureau was rebranded the Federal Bureau of Investigation (FBI) and agents were authorized to carry weapons.[13]

In 1938, an alleged German spy by the name of Griebl was accused of operating in the New York region. The FBI, under its expanded authority, was allowed to work on cases of espionage as well as foreign intelligence, and it took up the Griebl case. Donna Haverty-Stacke argues that the Griebl case "fanned the flames of fifth-column fears" and led to a focus on labor insurgency rather than espionage. On the cusp of American entrance into the war, fear that radicals in industry would target production motivated federal intelligence agencies to increase surveillance. This little "red scare" was a "rehearsal" for the later Cold War repression and demonstrates the bureau's priorities: Faced with a Nazi spy, it instead focused on radical unionists as the threat, assuming they might be part of a Soviet conspiracy. By June 1940, the FBI was armed with a new weapon against radicals: the

Smith Act which criminalized "advocacy of disloyalty" and the overthrow of the U.S. government as well as "printing, publishing, or distributing" anything that was seditious. By 1941, the FBI began to further extend its authority to monitor civil rights groups, progressive activists, and the American Communist Party itself under the presumption of communist plots. Though the Griebl case demonstrated the presence of a Nazi spy threat, Hoover remained focused on communists and those he assumed were communists.[14]

Both the Roosevelt and Truman administrations feared that American communists were passing information to the Soviets, and Roosevelt issued "secret executive directives" expanding the FBI's "investigative authority," which included wiretapping. Hoover took the opportunity to further his authority by authorizing bugging "break-in operations" and "mail-opening programs" aimed at alleged subversives. This authority expansion proceeded with Roosevelt's approval from 1936 through 1940, and he authorized the bureau to conduct "noncriminal investigations" into alleged subversives. Theoharis argues that Hoover took advantage of official goodwill and his bureau began to use extralegal methods, in violation of the constitution, by misinforming the executive branch and using external filing methods or records destruction to avoid documentary audits.[15] Theoharis also demonstrates that even with available documentation, the bureau still holds secrets about its behavior and that the FBI's delayed and inconsistent file releases after the passage of FOIA, coupled with the heavily redacted material, makes understanding the bureau's counterintelligence operations during WWII difficult for historians. For example, the Special Agent in Charge (SAC) files that recorded "policy and procedures" entirely redacted all sections about wartime investigations into the American Communist Party and Soviet activities.[16]

THE POYNTZ DISAPPEARANCE

The Poyntz story begins on a June day in 1937, still unknown, but somewhere between June 3 and 5, when Juliet Poyntz left her boardinghouse and walked toward Central Park, never to be seen again. After Marie B. MacDonald and her friend Elias Lieberman were contacted, they went to her room and found it disheveled. What was left behind led them to conclude that Poyntz was not gone voluntarily. There were empty food containers, breadcrumbs, and mothballs. Most troubling was that her passport, bank account information, and citizenship papers had been left behind. Though Poyntz had been born a citizen in Omaha, Nebraska, in 1913, she had married a German national, and under American law—a law that did not apply similarly to American men—this meant that she lost her citizenship. When her marriage had dissolved (though she never officially divorced), she had been forced to naturalize in the country of her birth. Both McDonald and Lieberman knew that Poyntz worked in the Soviet underground, recruiting people for anti-Nazi work in Germany, so they stayed quiet to avoid alerting authorities to her secret life, but as the months passed, MacDonald began to worry and urged Lieberman to file a missing person report. Poyntz's disappearance was officially reported in the press in December 1937, and Lieberman asked for a formal police investigation in January 1938.[17]

The ongoing Soviet purges increased fears about Poyntz's disappearance, and her friends urged the FBI to act and open a case. Herbert Solow, an anti-Stalinist journalist and

Carlo Tresca associate, wrote to the FBI asking for its help. He also called and spoke with an agent. James O'Neil, editor of the anti-Stalinist paper *New Leader*, wrote to Hoover, urging an investigation. Hoover responded to O'Neil that the case did not fall within the bureau's jurisdiction and the bureau thus could not open an investigation. Tresca and others argued that the Lindbergh Law did give the bureau jurisdiction, and later in 1938, when the bureau became involved in the Griebl investigation, Solow and Tresca believed that further legitimated its interference in the Poyntz case.[18] In 1943, a bureau report revealed that it had not responded to Juliet Poyntz's disappearance because there had been no evidence that Poyntz was engaged in "communist activities." Paradoxically, the report also noted that the New York Police Department considered her one of the top ten communists.[19]

Coincidentally, an American woman named Ruth Rubens was arrested in Moscow in December 1937, days before Poyntz's disappearance was reported in the press. Rubens was a member of the CPUSA, and she was married to a Latvian named Arnold Rubens, who happened to work for the same underground apparatus as Poyntz. Authorities claimed that the two were in Moscow to celebrate the 20th anniversary of the Bolshevik uprising but traveled under the name Robinson using false passports. The bureau received an anonymous tip claiming that there was "good reason" to believe Rubens and Poyntz had been caught up in the Soviet purges and eliminated by the Soviet secret police. Hoover forwarded the anonymous tip to Secretary of State Cordell Hull, distancing himself from both cases. The State Department sent representatives to speak to Rubens and followed her case. Arnold Rubens likely died in prison; besides a court appearance a year after their arrest, he was never seen again. Ruth Rubens served 18 months in a Soviet jail. After her release, she was naturalized as a Soviet citizen and never returned to the United States; she left behind a young daughter.[20] The anonymous tip did not make it into Poyntz's FBI file. The anonymous letter and Solow's phone call indicate that by 1938, the FBI had two tips claiming that Poyntz had been taken by the Soviets; it did not follow through on either.[21]

From December 1937 into January 1938, Carlo Tresca publicly accused the Soviet Union of having Poyntz abducted and killed. This led to a subpoena before a federal grand jury investigating the Rubens case. Tresca appeared on February 22, 1938, and gave a statement outlining Rubens's connections to the CPUSA. He then stated that he believed a Soviet agent named Schachno Epstein, a friend of Poyntz's, had lured her from her boardinghouse to nearby Central Park, where he had helped to facilitate her abduction by agents. Tresca's evidence of Poyntz's disappearance is admittedly dubious. He claimed that Poyntz told him directly that she was disillusioned with the party, a disillusionment that led to her fellow agent's distrust and her eventual silence. He also claimed to have seen Epstein in New York. There was no physical evidence to verify any of his accusations. I have argued elsewhere that the significance of Tresca's accusations is that they would be repeated as fact (by both liberals and conservatives) without verification for the next eighty years, leaving lingering questions about what happened to Poyntz and feeding anticommunist accusations that Soviet communism was homicidal.[22]

Tresca elaborated on his claims in a March 1938 article published in *The Modern Monthly*. He once again named Epstein as the man who had lured Poyntz to her abductors. He also mentioned a man named George Mink. Mink was known to American intelligence and had been under bureau investigation since 1935. Mink was a one-time leader of the

Marine Workers Industrial Union in New York with connections to the Soviet secret police. Mink had come to the FBI's attention in 1935 when he had been arrested in Denmark for rape and espionage and Danish law enforcement had contacted U.S. agents to find fingerprint data or any identification material to confirm it was him. He served a prison sentence until the summer of 1936. Tresca claimed in his article that Mink was the reason that Poyntz had become disillusioned with the Soviets because she had participated in show-trial interrogations with him in 1936, and the two had been seen together in Moscow.[23]

In 1937, Mink appeared in Barcelona, Spain, during the country's civil war. The war had been started by fascist military leader Francisco Franco after he tried to overthrow the left-wing democratically elected government. Leftists from around the world traveled to Spain to serve in brigades against the fascists; Americans fought in the Abraham Lincoln Brigade. Stalin's paranoia, however, spilled over into the war-torn country, and Mink allegedly went there under Soviet orders to liquidate suspected enemies of the Bolshevik revolution. He garnered a reputation as the "OGPU Butcher," the OGPU being the precursor to the KGB. One of those alleged enemies was a friend of Tresca's named Camilo Berneri, who was killed in the purges in Spain. Tresca believed that Mink was directly responsible for his friend's death. The bureau's file on Mink was active between 1935 and 1936 when he was on trial for espionage and serving his prison sentence; the file was quiet again until 1939. Though Tresca directly named Mink as a coconspirator in the Poyntz case, there is no mention of it in his file. Mink was known to intelligence agencies globally as a rapist and murderer. In 1941, he was being monitored while in Mexico, where he had tried to kill Leon Trotsky (one of Stalin's primary enemies) the year before. One agent wrote to his superiors that they intended to keep a good eye on Mink because it was "well known" that "something drastic happen[ed]" anywhere he was. Tresca's accusations against Mink were not followed up.[24]

The New York State Police (NYPD) investigation into the disappearance was not thorough either. As soon as the police were alerted to Poyntz's disappearance, they issued a press release claiming that she was one of the "top ten" communists in America. Tresca somehow obtained a police description card for Poyntz that contained physical descriptions of her. It is how we know that she suffered from lupus. It listed her as between 49 and 52 years old (she was 50), around 5 foot 6 inches, 160 pounds, and having an "ulcerated red mark" on the bridge of her nose, a visible symptom of lupus. Poyntz had brown eyes, a "sallow" complexion, and false teeth. Where and how Tresca obtained the description card is unknown, but he accused the police of going barely further than that. They delayed their investigation until specifically asked by her lawyer to investigate in January 1938, then checked morgues, hospitals, and asylums and took the "usual steps" when looking for a missing person. According to Tresca, however, the investigation was underwhelming and turned up no evidence of her whereabouts. The NYPD's investigation file on Poyntz has not been made available to researchers, and without access to the files, researchers have only witness accounts, like Tresca's.[25]

What we do know about the NYPD investigation comes from an FBI memo that noted the police file revealed "very little," though the agency recorded that a New York City Police officer reported that he had heard Poyntz had been purged. The bureau's Poyntz file picks up again in 1943 with a lengthy synopsis memo on her disappearance. This

coincides with the bureau's increased surveillance of communist party members and fellow travelers. For at least two years, the FBI did not trace any information on Poyntz's whereabouts, did not note that Tresca believed she had been betrayed by her Soviet bosses, and ignored that George Mink, a confirmed criminal, had been named as the potential killer. Tresca had been supplying the bureau with information, but agents noted in Tresca's file that they did not find the information reliable.[26]

Solow and Tresca grew frustrated with the FBI's inaction and independently investigated Poyntz's disappearance. In the absence of official interest in the Poyntz case, it is remarkable what the two men uncovered, mostly from their remaining contacts in the Communist Party or from former party members. Solow located a man named Mark Graubard whom Poyntz had recruited to travel to Europe to operate as a spy. Graubard supplied Solow with information about Poyntz's role in the underground. He also identified another of Poyntz's attempted recruits, William Harlan Hale. Both men told Solow that Poyntz was a recruiter, her job to locate people with connections in Europe, specifically in or near Germany. Then she would encourage people to travel there and supply Walter Krivitsky, her contact in Germany and the same man who had warned Barmine that he was going to be assassinated, with whatever information they could on the goings-on in Nazi Germany. Graubard was the only one of the two who had traveled to Europe at Poyntz's behest, but by 1937, he had been scared and had gone home, distancing himself from the Soviets and the Communist Party. Poyntz had failed to recruit Hale. Neither Hale nor Graubard appear in her FBI file, suggesting that Solow was a more successful investigator than the FBI.[27]

There was one woman Poyntz worked with in the underground whom both Hale and Graubard knew as another agent and who did feature in the FBI investigation. Lena, sometimes known as Tina or Miss Hale and a variety of other pseudonyms, was named by both Graubard and Hale as either a colleague of Poyntz's or her handler. Graubard met Lena in New York and then again in Switzerland for what he described as a "pointless" meeting, though she did tell him that Poyntz had been in Moscow in November 1936. Hale met Lena in New York at a party. She had cash that she was prepared to give him if he would immediately travel to Europe and begin work as an informer. Both men believed she was Eastern European, and Hale described her as beautiful. Whittaker Chambers, perhaps the most famous ex-communist witness of the Cold War, told Solow that he knew Lena as Tina and that she was a terrifying figure in the underground.[28]

Independently of Solow and Tresca, the bureau learned of Lena from an informer named Narceny. Narceny claimed that another spy he knew, named Edna Schultz, had told him that she had interrogated Poyntz in Moscow in January 1938, which would mean that Poyntz had been kidnapped from New York and held for seven months in a Soviet prison. Narceny also claimed that Poyntz had been executed only weeks after that interrogation. Narceny's information is doubtful because he shared two different stories of how the Soviets kidnapped Poyntz. In one story, he told agents that Lena invited Poyntz to a restaurant on June 3, 1937, where they met with Mink; Poyntz was plied with alcohol to the point of inebriation to facilitate her kidnapping and was then transported to Moscow. In another version, Narceny claimed that Poyntz had been taken from a party. By the time the bureau got around to following leads on the case, Tresca's story that Mink was Poyntz's

executioner had been circulating in the press for years. Was the FBI informer Narceny merely parroting a story that was widely available in the press? The informer system has been questioned for its reliability by many, partly because informers often had to keep producing information to stay in the bureau's good graces but also because some informers were paid for their information, leading to doubts about the information's veracity. None of the information was new, except for the claim that Poyntz had been alive for months after disappearing. The bureau file does not indicate follow-up with Edna Schultz.[29]

The only reason the bureau was interested in Lena was because she presented an opportunity for it to ferret out former communists and put them under the investigatory lens, which suddenly led to some interest in the Poyntz case. The bureau was not motivated to locate Poyntz, as evidenced by the amount of time that had already elapsed and its failure to follow up on leads. Instead, at the height of the anticommunist purges in the post-World War II period, it was looking for communists or former communists to prove the existence of a conspiratorial apparatus. In 1953, the bureau located a friend of Poyntz's named Amy Mac Master. Mac Master had an unusual story to tell about Lena: In 1936, using the name Mary Delmar, Lena jumped out of a window in Chicago in an apparent suicide attempt. She survived and then traveled east to Pennsylvania, where she left a train in Denholm wearing only pajamas. She was found crouching next to a barn in a state of distress. The farm owners let her stay with them, but she eventually made another attempt on her life, shooting herself in the head. She survived again but had to be hospitalized. Mac Master told the bureau that Poyntz had asked her to intercede on Lena's behalf with the hospital and let her stay with her. Mac Master claimed that she believed Poyntz and Lena did not get along; she traveled with Poyntz to the Denholm train station to retrieve her luggage, and when it was located, Poyntz began to search it. On another occasion, Poyntz visited the hospital with Mac Master, and Lena flew into a rage upon seeing Poyntz. This information did not offer concrete evidence of Lena and Poyntz's relationship, nor did it assist in finding why Poyntz went missing. The bureau agents tried to determine if MacMaster was a communist. She admitted to working with socialists, but she had not been a communist and did not work in the underground. She was an old friend of Poyntz dating back to 1924, and Poyntz had frequently used her address for her passport applications. Beyond that, it did not appear that Mac Master had any involvement in the CPUSA.[30]

Lena's injuries left her weak, dazed, and almost completely blind in one eye. Poyntz arranged for Mac Master to travel to Paris in September 1936 with Lena to hand her over to others. Mac Master said that Poyntz had also secured the help of Dr. Julius and Tillie Littinsky for the voyage. The four met at the pier before boarding the ship, and once again, when Lena saw Poyntz, she became enraged. The Littinskys and Mac Master traveled to Paris together, and Mac Master claimed that Tillie Littinsky took special interest in and care of Lena. The Littinskys, however, had a different version of the trip, and reason to avoid being linked to Poyntz: They had both been under investigation by the House Committee on Un-American Propaganda Activities.[31]

Dr. Julius Littinsky was the chief medical examiner for the International Worker's Order (IWO), an insurance company with links to the Communist Party. In 1936, when Littinsky was working for the IWO, it was run by Max Bedacht, who was alleged to be the New York contact for the Soviet underground. The Littinskys were eager to distance

themselves from the party. Littinsky alleged that Poyntz had pressed him to help bring Lena to Paris, that she had imposed on what was supposed to be a second honeymoon, and that he had not known Poyntz before she had asked. Mac Master's account was in direct contradiction, as she claimed that the Littinskys seemed to know Poyntz well and that they were active with Lena on the ship abroad. Additionally, Mac Master stayed in Paris for only three days and left Lena in the care of the Littinskys. It is not likely that Mac Master was trying to harm the Littinskys, but the couple did all they could to distance themselves from what had been a very active career with the Communist Party. Because the FBI did not know Graubard, it missed that he had met with Lena in November 1936, two months after the trip to Paris, when she told him Poyntz was in Moscow. Had a seriously injured Lena then traveled back to New York to assist in the kidnapping of Poyntz the following summer? Our understanding of this interaction is informed by the bureau's files. The FBI was focused on the Littinskys and on verifying their links to the CPUSA and a Soviet agent, and not on locating Poyntz. Lena's whereabouts were immaterial.[32]

Further evidence of the bureau's overriding interest in identifying communists is its interaction with Poyntz's attorney and friend, Elias Lieberman. Of those who were questioned about Poyntz, Lieberman may have been one of her closest friends. He had a long friendship with her and acted as her attorney in civil litigation to obtain money from her dead husband's estate before she went missing. Naturally, the bureau was interested in what information he had to share, but also in his politics. Lieberman cast doubt on Tresca's original claims that Schachno Epstein was involved in Poyntz's abduction. He told the FBI that Epstein's son Arnold had visited him at his law offices at his father's behest after Poyntz had disappeared. Arnold Epstein told Lieberman that after his father realized he had been publicly accused of Poyntz's abduction, he had written a letter to him asking Arnold to visit Lieberman and tell him that he had nothing to do with the disappearance. The bureau was quick to drop the Epstein angle, but only after confirming that Lieberman was not himself a communist or associated with any communist-linked groups.[33]

The bureau found many former communists willing to abandon their former friends to save themselves from investigation, or even to make some money. Paul Crouch epitomized the problem with the bureau informer system, and also happened, or so he claimed, to have been close friends with Poyntz. In 1942, after 17 years in the Communist Party, Crouch and his wife Sylvia were expelled for refusing an order to move to California. For five years, the Crouches remained silent about their years in the party, but postwar anticommunism presented a lucrative opportunity for former communists, and Crouch had just lost his job. Becoming an informer became a career move. Crouch's biographer Gregory Taylor describes Crouch's anticommunism as motivated by the personal slight from his expulsion, the need for money, and a growing anticommunist commitment. Crouch also displayed what Taylor argues is a "Manichean perspective" that characterizes some of the former communists who became witnesses in legislative hearings. It describes their transition from one worldview to its complete opposite.[34]

In 1949, Crouch wrote a series of articles for the *Miami Daily News* about espionage within the CPUSA, and the Poyntz disappearance was featured. He claimed that Poyntz had been kidnapped and killed by George Mink. He was regurgitating the story that Tresca had constructed, but it had a new life in 1949 when anticommunism became central to

American domestic and foreign policy. Anticommunism, coupled with Crouch's articles, brought renewed interest to Poyntz, and Crouch's accusations were carried in the national news. Crouch claimed that Poyntz was an old friend of him and his wife, though he botched personal information about her and did not appear to have had any contact with his friend for years before she had gone underground. The bureau did not believe his information but suddenly was forced to follow up as law enforcement agencies contacted it about dead women's bodies that had been found in the summer of 1937. None of the bodies was ever confirmed to be that of Poyntz.[35]

As Crouch repeated information that had been circulating for more than a decade, relishing in the attention and money he earned from his anticommunism, the media and government officials began to question his claims. Crouch, like other ex-communist witnesses, often contradicted himself, but Crouch did it with enough regularity that the media began to publicize his lies, prompting Attorney General Herbert Brownell to launch an investigation into the informer system. In 1955, Harvey Matusow, another ex-communist witness, published a book titled *False Witness*. In it, he admitted that he had fabricated much of his testimony, and he accused fellow witnesses Elizabeth Bentley and Crouch of doing the same. Crouch tried to recruit the FBI in a campaign to clear his name, but his financial situation and health began to deteriorate. In November 1955, he died from lung cancer. The informer system and individuals like Crouch became a drain on the bureau as the informers sought financial and public support. This also led to fatigue on the part of the American people, who were fed lurid but dubious stories about communist debasement for more than a decade.[36]

Neither Juliet Stuart Poyntz, Carlo Tresca, nor George Mink lived to witness Cold War anticommunism and the purges of the American Communist Party. George Mink allegedly died in Mexico in 1941. Carlo Tresca was gunned down in Manhattan in 1943, and some of his friends thought that communists might have had him killed because he had accused them of Poyntz's disappearance. The Tresca assassination is officially unsolved, but the NYPD identified individuals in the Italian Mafia as the likely culprits. Tresca's accusations against Mink were included in both men's FBI files, but the FBI never followed up, nor investigated whether the notorious assassin Mink was ever involved. Locating Poyntz or finding out if the Soviets had her "disappeared" was never a priority; what was prioritized in the Poyntz case was locating living communists.[37]

Beverly Gage's recent Pulitzer Prize-winning biography of Hoover demonstrates that communists were an obsession for him during the 48 years he served as director. The spy scares in the years after World War II provided the bureau with the opportunity to target and harass communists, though evidence has shown that the Soviet spy ring had largely ceased to exist by 1947 and those like Poyntz had not spied to undermine the U.S. government; rather, they did not believe the United States was doing enough to stop the spread of Hitlerism. The CPUSA was an outspoken antifascist, antiracist, and antisexist organization that Hoover believed linked social justice and civil rights organizations to an alleged communist conspiracy. As Gage argues, even when it could not be proven, Hoover believed his agents just needed to keep looking for evidence. The bureau's notorious Counterintelligence Program (COINTELPRO), which focused on social justice activists—famously including Martin Luther King Jr., whom Hoover believed was the most

dangerous Black man in the United States—was created first to target communists. The bureau failed to uncover a violent communist conspiracy that sought to overthrow the U.S. government but used the tactics it honed on communists to harass the civil rights, new left, and antiwar movements.[38]

This has had long-lasting consequences for both social justice in the United States and the growth of right-wing violence. While Hoover put tepid energy into investigating the Ku Klux Klan, his focus remained on Black activists and their allies particularly in the CPUSA. Lerone Martin's recent study on Hoover and white evangelicals suggests that Hoover was instrumental in the current rise of Christian nationalism. He operated with almost unlimited authority in his tenure as director, and during that time, he created alliances with leading evangelicals and other conservative organizations, some of which assisted in collecting intelligence on party members. Small-government conservatives embraced Hoover's big-government agency and his use of illegal surveillance tactics to undermine social justice groups. Today the bureau has faced rising white supremacist violence disarmed and unprepared; even whistleblowers in the agency have argued that it regularly falls short in surveilling white supremacists who threaten violence. Kathleen Belew demonstrated that the bureau quickly pinned the 1993 Oklahoma City Bombing on Timothy McVeigh and only two other accomplices and suppressed information that McVeigh not only worked with several white supremacist groups but also got the idea from them (a similar attack had been tried once before on the same building) and that the attack was orchestrated by others who worked with McVeigh. More recently, the bureau ignored mountains of data in the days before the January 6, 2021, attacks on the capital building that white supremacists had been planning violence.[39]

The bureau's disinterest in the Poyntz case demonstrates that it has long exercised the right to determine what constitutes a crime. Cold War anticommunism gave the FBI license to track and harass radicals and put on a show of grave concern for an alleged communist menace even while it ignored a suspected purge on its shores. The bureau's files reveal that the alleged communist threat was just as often about changes to the status quo and fear of change, and this empowered the FBI to yield powerful weapons of surveillance against citizens. Poyntz became a useful tool to enable the surveillance state; perhaps this explains the bureau's contemporary reluctance to release its files.

NOTES

1. Arthur Irwin (1937); "Police Department Description Card for Juliet Stuart Glaser—nee Julia Poyntz," Guide to Carlo Tresca, Box 2, Folder 43, Tamiment Library, New York University, New York, New York; Elias Lieberman, "The Mysterious Disappearance of Juliet or A Lady Communist Vanishes (A True Story)," p. 2. Elias Lieberman Manuscript Collection, Kheel Center, Cornel University, Ithaca, New York.
2. FBI Memo, NY 100-59538, Sam Tanenhaus Papers, Box 53 Folder 1, Hoover Institution Archives, Stanford University, Stanford, CA. The Communist Party Poyntz joined in 1919 was an organization that had many names until it eventually settled on the Communist Party of the United States (CPUSA). For the sake of consistency and clarity, this article will refer to it as the CPUSA.

3. Meier (2008:228); Lynn (2021:2, 56–57).
4. Lynn (2021:2, 57).
5. Reitman (2018); Gage (2022:xv).
6. One example of the FBI's unwillingness to release its files is in the case of Charlotta Bass. Bass was not a Communist Party member but became an active fellow traveler in the post-World War II years. In 1994, scholar Roger Streitmatter wrote about a lengthy FBI file on Bass that showed not only the bureau's surveillance of her but also the CIA's surveillance of her when she traveled overseas. The bureau has made only 50 pages of that file available recently, and those pages are not very telling. They concern an insurance conflict over personal issues and reveal little of the bureau's surveillance of Bass. Streitmatter lost the file in a flood in his office. Other scholars who cited the lengthy FBI file told me that they had been citing only Streitmatter. In March 2021, Charles Holm, having received the entirety of Bass's file from one of Bass's former colleagues, contacted me. See Streitmatter (1994).
   The New York State Police also refuse to release their file on Poyntz. I have requested it on three separate occasions and have been given various reasons for it not being available, including that it is an open investigation and that there is no file.
7. David M. Harvey, Section Chief, Federal Bureau of Investigation, communication to author, 23 February 2007, 26 April 2007, 14 November 2008; Michael G. Seidel, Section Chief, Federal Bureau of Investigation, communication to author, 26 June 2020.
8. Gage (2002:384, 645–46, 649, 651).
9. Greenwood (2021:15); Finan (2007:3).
10. Jeffreys-Jones (2007:82–84).
11. Jeffreys-Jones (2007:85–86).
12. Theoharis (2002:11).
13. Jeffreys-Jones (2007:88–92).
14. Jeffreys-Jones (2007:96); Weiss (1983); Haverty-Stacke (2013:68–71).
15. Theoharis (1981:5–6, 2002:11).
16. Theoharis (2002:13–14).
17. Elias Lieberman, "The Mysterious Disappearance of Juliet or A Lady Communist Vanishes (A True Story)," 2–3. Elias Lieberman Manuscript Collection, Kheel Center, Cornel University, Ithaca, New York; FBI Memo, NY 100-59538, Sam Tanenhaus Papers, Box 53 Folder 1, Hoover Institution Archives, Stanford University, Stanford, CA.
18. Jeffreys-Jones (2007:102–103, 108); Herbert Solow, "Memo," 1938, Herbert Solow Papers, Box 10, Folder 8, Hoover Institution Archives, Stanford University, Stanford, CA. A discredited FBI agent named Leon Turrou, the SAC on the Griebl case, shared a photograph with Herbert Solow that allegedly depicted Griebl with Poyntz and George Mink. Poyntz associates could not identify her in the photograph, and a State Department official claimed the photo was doctored. Turrou hoped the Griebl case would make his career, but under his leadership, some of the accused Nazis escaped rather than testify before a grand jury. Griebl lost his job, and the debacle embarrassed the FBI.

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Measuring Families' Outsourced Household Labor in Country Context: Accounting for Country-Level Gender- and Class-Based Inequality

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ABSTRACT

This study investigated the incidence of families' outsourced household labor overall and for five tasks in 41 countries using cross-national data from the 2012 International Social Survey Programme Family and Changing Gender Roles Module IV, as well as measures of country-level class-based and gender inequality appended from the United Nations Development Programme, the Organisation for Economic Co-operation and Development, and the World Bank. The findings suggested that outsourcing was more of an exception than a norm, with only about 12% of families in the data reporting outsourcing any task. Although variation existed in rates of outsourcing overall across countries, small repairs and cleaning were the most frequently outsourced tasks across the majority of countries. Unexpectedly, outsourcing was more common in less egalitarian countries relative to gender. This finding may suggest that where women cannot renegotiate household labor with their partners, outsourcing might be a more feasible strategy for reducing housework loads. Further, and as anticipated, outsourcing was more common in less egalitarian countries relative to measures of class-based inequality. Class-based inequality may provide the conditions under which outsourcing household labor is feasible, with both a low-skill domestic workforce on one end and families with financial resources to pay for help on the other. I

conclude with suggestions for future research, focusing on what questions remain for quantitative and qualitative investigations.

KEY WORDS Outsourced Household Labor; Gender Inequality; Class-Based Inequality; Cross-National Analysis

A recent *New York Times* article, "Fighting Over Chores? Spend Some Money, Save the Marriage," suggests that Americans might be happier individually and in their relationships if they outsource time-consuming, unpleasant household chores (Frakt 2018). While "buying time" might "promote happiness" (Whillans et al. 2017), several questions about outsourcing household labor, especially cross-nationally, remain. This research addresses three of these unanswered questions.

First, just how common is it for families across the globe to outsource their household labor, and, second, what tasks are most frequently outsourced? Although various studies of individual countries suggest that families who outsource are in the minority (Cheung and Lui 2023; Craig et al. 2016; Gonalons-Pons 2015; Kornrich and Roberts 2018; Sullivan and Gershuny 2013; van der Lippe, Tijdens, and de Ruijter 2004), internationally comparable estimates are rare in academic research (Estevez-Abe 2015).

Lastly, how does country context shape rates of outsourcing? At the individual and family levels, economic resources, work and family demands, and attitudes may shape decisions to (or not to) outsource household labor (Baxter, Hewitt, and Western 2009; Cohen 1998; Oropesa 1993; South and Spitze 1994; Spitze 1999; Stuenkel 2005; van der Lippe, Frey, and Tsvetkova 2012; Yang and Magrabi 1989). At the country level, however, less is known about outsourcing household labor. Only one previous cross-national study directly investigated country context with outsourcing as a dependent variable (Estevez-Abe 2015). Studies on the division of household labor (Batalova and Cohen 2002; Chang 2000; Fuwa and Cohen 2007; Geist and Cohen 2011; Heisig 2011; Ruppanner 2010b; Ruppanner and Treas 2015) and perceived equity in the division of household labor (Blumberg 1984; Blumberg and Coleman 1989; Braun et al. 2008; Davis and Greenstein 2009; Fuwa 2004; Fuwa and Cohen 2007; Jansen et al. 2016; Ruppanner 2010a) provide clues into other country contexts that shape household work, including gender inequality indices, measures of class-based inequality, and aggregate country-level measures created from survey data. Which of these measures correlate with outsourcing household labor and might be useful in future multilevel research?

Filling these gaps in the existent literature, I investigated the incidence of families' outsourced household labor overall and for five tasks in 41 countries. To complete this research, I utilized cross-national data from the 2012 International Social

Survey Programme (ISSP) Family and Changing Gender Roles Module IV, as well as measures of country-level gender- and class-based inequality appended from the United Nations Development Programme (UNDP), the Organisation for Economic Co-operation and Development (OECD), and the World Bank. The findings provide insight into rates of outsourcing overall, as well as by task and country. They also speak to the connections between gender and class-based inequality and outsourcing at the country level. Finally, the findings provide context for future quantitative and qualitative studies that can further fill gaps in the existent literature.

BACKGROUND

Rates of Outsourcing

Scholars have investigated ways to create more equality within families, and one possibility—outsourcing household labor such as cooking, cleaning, shopping, paying bills, laundry, yard work, home maintenance, and watching children—has received occasional academic and public attention (Raz-Yurovich 2012a, 2014). Despite this interest, rates of outsourcing cross-nationally, either overall or by specific tasks, are unclear. Just how frequent is outsourcing across the globe?

Past research provides some clues about how common outsourcing might be. Most akin to this cross-national investigation, Estevez-Abe (2015) found in her examination of cross-national data from 22 OECD countries that just under 4% of respondents reported outsourcing cleaning. Beyond Estevez-Abe's (2015) work, no other studies, to my knowledge, have examined the incidence of outsourcing cross-nationally either overall or by specific tasks.

Still, a number of studies have examined outsourcing in individual countries (Cheung and Lui 2023; Craig et al. 2016; Gonalons-Pons 2015; Kornrich and Roberts 2018; Sullivan and Gershuny 2013; van der Lippe et al. 2004). One theme that emerges from these reports is that families who report outsourcing are in the minority. Outsourcing rates appear to hover around 10%–15% in most cases and are clearly dependent upon the researchers' conceptualization of outsourcing, specifically which tasks are measured. For example, Kornrich and Roberts (2018) examined data from the 2010 U.S. Consumer Expenditure Survey (CES) and suggested that fewer than 10% of married households outsourced housekeeping, about 15% outsourced gardening/lawn care or babysitting/nannies, and about 25% outsourced day care.

Research from Australia, the Netherlands, and the United Kingdom reflects outsourcing rates similar to those of the United States. Craig et al. (2016:1227) used longitudinal data from the 2005, 2008, and 2011 Household, Income, and Labour Dynamics in Australia (HILDA) Survey and found the rate of outsourcing "cleaning, washing, ironing, cooking, etc." to paid others was about 12%. Van der Lippe et al. (2004:226) used data from the 1995 Dutch National Time Budget and

found that "12 percent of Dutch households had paid domestic help," with variation by family structure (dual-income households outsourcing more than single-earner households). Sullivan and Gershuny (2013:1315) used 2000/2001 UK Time Use data and found "that the overall percentage of couples who purchased any domestic or caring assistance was quite small," at 13%, with commonly outsourced tasks including childcare (6%), cleaning (5%), and tasks like "gardening, window cleaning, adult care, and pet care" (1% or less).

Other locales, such as Spain and Hong Kong, report higher rates of outsourcing. Specifically, Gonalons-Pons (2015:211) found that about 21% of dual-earner Spanish families hired domestic help or reported paying for assistance with "cooking, cleaning, laundry and ironing, shopping, household management, care of children, and care of adults." Lastly, using data collected in 2018–2019, Cheung and Lui (2023) found that about 22% of dual-earner families in Hong Kong hired live-in foreign domestic workers, especially when parental help was not available.

Understanding Country Context

Previous research examined country context relative to outsourcing (Barone and Mocetti 2011; Cortés and Pan 2013; Cortés and Tessada 2011; Estevez-Abe 2015; Farrè, González, and Ortega 2009; Furtado and Hock 2008; Milkman, Reese, and Roth 1998).[1] Despite the breadth of this research, only one of these studies directly measured country context as it relates to outsourcing household labor as a dependent variable. Specifically, Estevez-Abe's (2015) work suggested that the proportion of low-skilled workers and low-skilled immigrant workers in a country's population, presumably a proxy for a supply of domestic workers, had a positive relationship with the likelihood of outsourcing cleaning (Estevez-Abe 2015). Interestingly, despite the logical connections between class-based inequality and the proportion of a country's labor force made up of low-skilled workers, Estevez-Abe (2015) did not find significant effects of within-country wage inequality measured with OECD D9/D1 ratios.

Although not much country-level research exists that positions outsourcing as a dependent variable, more is known about country-level indicators relative to the division of household labor (Batalova and Cohen 2002; Chang 2000; Fuwa and Cohen 2007; Geist and Cohen 2011; Heisig 2011; Ruppanner 2010b; Ruppanner and Treas 2015) and perceptions of equity in the division of household labor (Blumberg 1984; Blumberg and Coleman 1989; Braun et al. 2008; Davis and Greenstein 2009; Fuwa 2004; Fuwa and Cohen 2007; Jansen et al. 2016; Ruppanner 2010a). This thread of research reveals the importance of considering country context. For instance, Fuwa (2004) showed that women living in countries marked by high levels of gender inequality gain less bargaining power from their individual characteristics, such as their income, relative to the division of household labor.

Country-level measures often utilized within this body of research include gender inequality indices, measures of class-based inequality, and aggregate country-level measures created from survey data.

First, single index measures of gender inequality quantify the status of women—for instance, relative to economic participation, political representation, and health. One of these single-index measures, the UNDP's Gender Empowerment Measure (GEM), more recently replaced by the updated Gender Inequality Index (GII), has been used in previous research to understand how country context shapes the division of household labor (Batalova and Cohen 2002; Fuwa 2004; Ruppannear 2010a; Ruppanner 2010b) or conflict over household labor (Ruppanner 2010a).

In addition to index measures of gender inequality, previous work investigated the relationship between class-based inequalities and the division of household labor, for example, utilizing the Gini index of income inequality (Heisig 2011). The Gini index measures "the extent to which the distribution of income or consumption among individuals or households within an economy deviates from a perfectly equal distribution" (World Bank n.d.a). The Gini index ranges from 0 to 100, a continuum from "perfect equality" to "perfect inequality" (World Bank n.d.a).

Next, to understand country context, researchers have created various country-level averages with survey data. For example, previous studies have measured the average division of household labor (Braun et al. 2008; Geist and Cohen 2011), gender attitudes (Geist and Cohen 2011; Jansen et al. 2016), female labor force participation (Geist and Cohen 2011), and female-to-male wage ratio (Braun et al. 2008; Geist and Cohen 2011; Jansen et al. 2016).[2]

Clearly, accounting for country context is useful when investigating gendered family outcomes such as outsourcing. Although country context is multifaceted and valuable, it would be unlikely that any one analysis would account for all possible country-level measures, for multiple reasons. Firstly, there is likely a great deal of conceptual overlap, which in regression analyses would violate statistical assumptions of multicollinearity. Secondly, especially for measures appended from sources like OECD statistics, data are commonly missing for non-OECD and other less studied countries. This analysis, first descriptive and then bivariate, allows me to assess many of these country-level variables' relationships to outsourcing and each other, providing insight for future researchers seeking to employ multilevel analyses.

Measuring Outsourcing

Despite academic and public interest in outsourcing household labor, few nationally representative survey efforts directly ask respondents about outsourcing behaviors. That being the case, researchers studying outsourcing developed a number of strategies to account for outsourcing behavior. One such strategy is to

use expenditure data that indicate the amount of money spent on outsourced tasks (Bittman, Matheson, and Meagher 1999; Cohen 1998; de Ruijter, Treas, and Cohen 2005; Kornrich and Roberts 2018; Treas and de Ruijter 2008; Yang and Magrabi 1989). A second strategy is using data collected from small unique samples that include specific outsourcing questions (de Ruijter and van der Lippe 2009; Killewald 2011; Moras 2017; Oropesa 1993; Spitze 1999; Stuenkel 2005; van der Lippe et al. 2012; Weagley and Norum 1989). A third strategy is using larger, representative datasets collected outside the U.S. context that include specific outsourcing questions (Halldén and Stenberg 2014; Raz-Yurovich 2012b). A fourth strategy is aggregating national data to create proxy measures of outsourcing and estimating impacts (Barone and Mocetti 2011; Cortés and Pan 2013; Cortés and Tessada 2011; Furtado and Hock 2008). Yet another strategy is using larger, representative, and internationally comparable datasets such as the ISSP, which collects data on housework, and creating proxy outsourcing measures (Braun et al. 2008; Estevez-Abe 2015).

As is to be expected, each of these strategies yields a unique measure of outsourcing with advantages and disadvantages. Expenditure data are advantageous in the direct measurement of *paid outsourcing* but generally lack measures of *unpaid outsourcing* and other indicators important for this study (i.e., gender attitudes and the division of household labor). Data collected from small unique samples also provide a direct measure of outsourcing; however, the data fall short relative to representativeness. Further, larger representative data from individual countries might adequately provide direct or indirect measures of outsourcing, but still, these data are not necessarily comparable. Indeed, most data sources are lacking in their ability to be compared cross-nationally.

A final strategy used in measuring outsourced household labor is captured in Estevez-Abe's (2015) research on outsourcing cleaning, as well as Braun et al.'s (2008) examination of the impact of household aids on perceptions of equity in the division of household labor, both studies using the cross-national 2002 ISSP data. Specifically, Estevez-Abe (2015) measured outsourced cleaning using the frequently asked question about the division of household labor "Who usually [cooks, cleans, shops, etc.]," with responses including *yourself*, *your partner*, *a third person*, and *not applicable*. Respondents who reported that a particular household task was completed by a third person were counted as outsourcing. Similarly, Braun et al. (2008:1150) operationalized the presence of a household aid by "denoting whether any of the four household tasks (doing laundry, cleaning, preparing meals, and shopping) . . . [was] performed by a third party."

A limitation of Braun et al. (2008) and Estevez-Abe's (2015) measures is that it is impossible to know if the third person completing housework is paid or unpaid, another adult or child living in the household, or an outside service provider. Estevez-Abe (2015) controlled for this issue by limiting her analyses to

households with two adults. Of course, even this dropping of households with three or more adults cannot control for the possibility that the third person completing a particular task could be a young child or teenager residing in the household. As the previous summary of outsourcing measures demonstrates, however, no operationalization of outsourcing is perfect. All measures fall short in at least one respect, in sample generalizability, the ability to be compared cross-nationally, or measurement precision.

Research Questions and Hypotheses

Using cross-national data from 41 countries collected as part of the 2012 ISSP Changing Family and Gender Roles Module, I investigated three research questions and hypotheses, which follow the findings of past studies.

> *Research Question 1*: How common is outsourcing?
> *Hypothesis 1*: I expected that outsourcing will be more of an exception than a norm.
>
> *Research Question 2:* What is the incidence of outsourcing laundry, small repairs, grocery shopping, cleaning, meal preparation, or any of these tasks across countries?
> *Hypothesis 2:* I expected to find variation in reported rates of outsourcing by task and country.
>
> *Research Question 3:* What country-level measures of inequality and gender inequality correlate with outsourcing?
> *Hypothesis 3:* I expected outsourcing to be shaped by gender inequality, with outsourcing more common in egalitarian countries, where women have more power to bargain out of housework with their proportional incomes or education. Further, I expected measures of class-based inequality to positively correlate with outsourcing of household labor.

METHODS

ISSP Data

To examine the research questions posed above, I used data from the 2012 ISSP Family and Changing Gender Roles Module IV, which are cross-national and represent 41 countries in the full data (ISSP Research Group 2016).[3,4] The 2012

ISSP Family and Changing Gender Roles IV Module also included questions about the organization of income and work between partners, the division of household labor, gender attitudes, and demographic variables, making the data a good fit for this investigation.

ISSP Sample

I restricted the sample to those who were married or living in a civil partnership at the time of the survey, in order to understand outsourcing household labor as practiced within families.[5] Respondents who said they were not living with their partner, had no partner, or refused to answer the question "Do you have a spouse or a steady partner and, if yes, do you share the same household?" were also dropped from the analysis.[6] Respondents who indicated that they lived by themselves were also dropped from the analysis.[7] Lastly, I dropped respondents missing data on the dependent variables, the outsourcing measures, prior to the analysis. After dropping cases on marital status, living arrangements, and the outsourcing variables, 32,493 respondents from 41 countries remained in the data.

ISSP Measures

I measured *outsourced household labor* similarly to Braun et al. (2008) and Estevez-Abe (2015). The original survey question asked respondents, "In your household, who does the following things?" for tasks including laundry, small repairs, shopping for groceries, household cleaning, and preparing the meals. Respondents who said the task was "done by a third person" were coded as 1, outsourcing. Those who provided any other response were coded as 0, not outsourcing. I created five dichotomous variables to capture outsourcing each of the measured tasks. Further, I constructed a dichotomous variable set equal to 1 if the respondent indicated that any of the five tasks were outsourced and 0 if no tasks were outsourced.[8]

Next, I created weighted, country-level means of the ISSP survey data, as has been similarly done in other research (Braun et al. 2008; Geist and Cohen 2011; Jansen et al. 2016). Specifically, I generated weighted, country-level averages of outsourcing, female partners' proportion of household labor, female partners' labor force participation, female partners' proportion of household income, and female partners' educational attainment. Finally, I produced weighted country-level averages of the overall gender ideology scale and its three subscales that represent attitudes about women's relationship to the home, women's work, and normative gender roles, following Knight and Brinton's (2017) typology. These country-level measures generated with ISSP data have multiple advantages. First, they allowed for an examination of the relationship between country context and outsourcing

household labor. Further, because they were generated using the same data as the analysis, very little data were missing at the country level. In the paragraphs that follow, I describe how each of these variables, with the exception of the outsourcing variables described above, were constructed using the individual-level data prior to collapsing the dataset into country-level means.

I measured female partners' proportion of household labor with variables that captured respondents' and their spouses' reported hours spent on household work, not including childcare or leisure activities. As has been done in previous work examining time spent on housework, I top-coded housework hours at 45 hours per week, which was approximately at the 95th percentile for respondents' reports of their own (96th percentile) and their spouses' (95th percentile) housework hours (South and Spitze 1994). Next, using respondent sex, I created measures of female and male partners' housework hours as well as total family housework hours. Lastly, I divided female partners' housework hours by the total family housework hours, resulting in a measure that showed the proportion of household labor completed by the female partner.

Female partners' labor force participation was set equal to 1 if the female partner worked and 0 if the female partner did not work. Female partners' proportion of household income was measured by dividing female partners' income by total household income. Female partners' educational attainment was measured with an internationally comparable ordinal variable, where higher responses indicate more education. Specifically, response categories included (0) "No Formal Education," (1) "Primary School (elementary school)," (2) "Lower Secondary (does not allow entry to university)," (3) "Upper Secondary (allows entry to university)," (4) "Post-Secondary, Non-Tertiary (other upper secondary programs toward labor market or technical formation)," (5) "Lower Level Tertiary, first stage (also technical schools at a tertiary level)," and (6) "Upper Level Tertiary (Master or Doctorate)."[9,10]

To measure gender ideology, I scaled a series of seven questions that probed gender attitudes: "A working mother can establish just as warm and secure a relationship with her children as a mother who does not work" (reverse-coded); "A pre-school child is likely to suffer if his or her mother works"; "All in all, family life suffers when the woman has a full-time job"; "A job is all right, but what women really want is a home and children"; "Being a housewife is just as fulfilling as working for pay"; "Both the man and the woman should contribute to the household income" (reverse-coded); and "A man's job is to earn money; a woman's job is to look after the home and family." Possible responses included (1) *Strongly agree*, (2) *Agree*, (3) *Neither agree nor disagree*, (4) *Disagree*, and (5) *Strongly disagree*.[11,12] I computed the *gender ideology* scale by adding the scores and dividing the result by the number of gender ideology questions each respondent

answered (α = 0.724 for Spain, 0.731 for all other countries). Higher scores on the gender ideology scale indicated more liberal gender attitudes.

Following Knight and Brinton's (2017:1487) work that argued that gender attitudes may be more complex than what is captured in "conventional approaches" that place attitudes on a "linear continuum from traditionalism to liberal egalitarianism," I created alternative measures of gender ideology that split the seven questions listed above into three subscales: attitudes about women's relationship to the home, women's work, and normative gender roles. Specifically, attitudes about women's relationship to the home were measured with the questions "A job is all right, but what women really want is a home and children" and "Being a housewife is just as fulfilling as working for pay." Attitudes about women's work were measured with the questions "A working mother can establish just as warm and secure a relationship with her children as a mother who does not work" (reverse-coded); "A pre-school child is likely to suffer if his or her mother works"; and "All in all, family life suffers when the woman has a full-time job." Attitudes about normative gender roles were measured with the questions "Both the man and the woman should contribute to the household income" (reverse-coded) and "A man's job is to earn money; a woman's job is to look after the home and family."

Just as above for the overall gender ideology scale, possible responses to all questions used in these gender ideology subscales included (1) *Strongly agree*, (2) *Agree*, (3) *Neither agree nor disagree*, (4) *Disagree*, and (5) *Strongly disagree*. Attitudes about the subscale women's relationship to the home were computed by adding the scores from the two questions and dividing the result by the total number of questions each respondent answered (α = 0.4370 for Spain, 0.507 for all other countries). Attitudes about women's work were computed by adding the scores from the three questions and dividing the result by the total number of questions each respondent answered (α = 0.714 for Spain, 0.701 for all other countries). Attitudes about normative gender roles were computed by adding the scores from the two questions and dividing the result by the total number of questions each respondent answered (α = 0.483 for Spain, 0.265 for all other countries). Higher scores on the gender ideology subscales indicated more liberal gender attitudes. For a full review of Knight and Brinton's (2017) latent class analysis of gender attitudes, refer to "Appendix A: Measuring Gender Attitudes."

Appended Country-Level Measures

In addition to the country-level measures I generated using the ISSP data, I appended one measure of country-level gender inequality and three related to class-based inequality. First, I included the gender inequality index (GII) from the *Human Development Report 2011* (UNDP 2011). The GII factors together "gender-based disadvantage in three dimensions—reproductive health, empowerment, and the

labour market" (UNDP 2011:177). I chose the GII because of its popularity and usefulness in past studies (Batalova and Cohen 2002; Fuwa 2004; Ruppanner 2010a, 2010b), despite various issues with single index measures of gender inequality generally and with measures specific to the GII (Beneria and Permanyer 2010; Bose 2015; Permanyer 2013a, 2013b).

Second, I appended OECD data reflecting the percent of low-skill working-age adults and immigrant low-skill working-age adults ages 25–64 years old by country (data.oecd.org, stats.oecd.org). Following Estevez-Abe (2015), I defined low skill as having completed below an upper-secondary level of education. I appended 2012 data when possible and the closest year when 2012 data were not available. Lastly, I appended the Gini index as reported by the World Bank (World Bank n.d.b).[13]

Statistical Method

In the pages that follow, I first review weighted individual-level descriptive statistics about outsourcing overall, as well as by task and country, to examine my first and second research questions, about overall rates of outsourcing and variation in outsourcing by task and country. Next, I turn to collapsed country-level data to answer the third research question, about the relationship between country-level measures of gender inequality, income inequality, and outsourcing. After reviewing descriptive differences in the country-level measures, I utilize a correlation matrix to investigate the relationship between the country-level measures and outsourcing. Correlation using Pearson's *r* is an appropriate way to measure the "strength and direction of relationship" between continuous variables (Levin and Fox 2004). Although at the individual level some of the measures utilized in this analysis are binary (outsourcing variables and female partners' labor force participation) or ordinal (educational attainment), collapsing the data into country-level means changed the nature of these measures to continuous, making an analysis of correlation using Pearson's *r* feasible.

Because of missing data on country-level measures, Taiwan is omitted in analyses that include the GII and the Gini index; Turkey is omitted in analyses that include female partners' proportion of household income; Bulgaria, Croatia, Japan, the Philippines, Taiwan, and Venezuela are omitted in analyses that include the percent of low-skill working-age adults; and Argentina, Bulgaria, China, Croatia, Finland, Great Britain, Iceland, India, Japan, Norway, the Philippines, Russia, South Africa, South Korea, Taiwan, Turkey, and Venezuela are omitted from analyses that include the percentage of low-skill working-age immigrant adults. I note the number of countries included in each analysis, with a range of 24 to 41 countries, within the resultant tables.

RESULTS

Descriptive Statistics

Table 1 displays rates of outsourcing overall, by task, and by country. The table is sorted from highest to lowest country relative to outsourcing any task. Overall, 11.57% of respondents reported outsourcing any of the measured tasks, 2.89% reported outsourcing laundry, 5.96% reported outsourcing small repairs, 1.82% reported outsourcing groceries, 5.20% reported outsourcing cleaning, and 2.42% reported outsourcing meals. Small repairs and cleaning were the most frequently outsourced tasks.

Table 1. Rates of Outsourcing

	Any Task (%)	Laundry (%)	Small Repairs (%)	Groceries (%)	Cleaning (%)	Meals (%)	N
South Africa	29.71	17.43	9.32	2.87	**20.51**	6.35	805
Taiwan	27.29	9.68	10.90	5.50	9.52	**14.03**	1,163
Argentina	19.14	5.47	**12.99**	3.51	6.95	3.76	367
Israel	18.81	3.44	7.95	1.85	**10.99**	1.99	755
India	16.41	7.73	5.57	**10.77**	8.70	0.00	575
China	16.38	3.52	**12.13**	3.82	3.98	4.79	4,100
Portugal	15.97	4.91	**9.25**	1.52	8.36	1.17	478
Chile	15.84	5.97	**9.35**	3.25	8.19	5.14	581
Mexico	15.38	5.32	**9.71**	3.82	5.90	4.39	865
Spain	15.25	3.13	**9.50**	2.26	7.38	2.51	1,548
Philippines	15.23	**8.38**	6.60	3.59	7.05	4.75	734
Belgium	14.28	0.75	2.58	0.42	**11.96**	0.68	1,210
Austria	12.27	4.18	**5.30**	0.64	3.28	1.59	439
Bulgaria	11.63	1.25	**9.52**	0.55	1.20	1.55	608
Netherlands	11.07	0.11	3.26	0.26	**8.81**	0.19	766
Canada	10.77	1.45	2.90	0.00	**7.87**	0.25	608
United States	9.90	1.42	3.39	0.99	**5.72**	1.36	554
Switzerland	9.61	1.29	4.16	0.57	**5.88**	1.00	697
Australia	8.82	1.32	3.17	0.29	**5.51**	0.64	881
Germany	8.76	1.54	3.47	0.53	**4.75**	0.94	887
Croatia	8.54	0.91	**6.04**	0.59	1.34	2.29	606

Table 1. Rates of Outsourcing, concl.

	Any Task (%)	Laundry (%)	Small Repairs (%)	Groceries (%)	Cleaning (%)	Meals (%)	*N*
Hungary	8.31	1.84	**7.21**	1.49	1.82	1.54	423
Denmark	7.46	1.41	1.69	0.28	**5.77**	0.42	710
France	7.27	0.59	2.34	0.33	**5.54**	0.22	1,015
Venezuela	7.24	2.02	**3.82**	1.10	2.39	1.38	208
GB and/or UK	7.09	0.65	3.15	0.22	**4.30**	0.00	424
Sweden	6.98	0.58	3.10	0.19	**3.68**	0.00	516
Slovakia	6.97	1.70	**3.54**	1.63	2.24	1.32	705
Czech Republic	6.83	1.37	**6.02**	0.89	0.86	1.02	969
South Korea	6.46	2.90	**3.00**	1.79	2.60	2.91	769
Slovenia	6.38	1.87	**3.27**	1.40	1.87	2.02	643
Poland	6.09	0.82	**3.32**	1.51	2.15	1.64	641
Norway	5.94	0.26	0.92	0.13	**4.88**	0.26	758
Ireland	5.86	0.77	**3.17**	0.61	2.32	0.42	721
Latvia	5.47	1.21	**3.86**	0.66	0.52	0.90	464
Turkey	5.26	1.45	**4.08**	1.00	1.54	1.27	1,102
Japan	4.96	1.50	**2.26**	1.35	0.75	1.65	665
Iceland	4.75	0.47	1.66	0.19	**3.43**	0.34	698
Lithuania	4.50	0.72	**3.10**	0.17	0.63	0.22	596
Russia	3.98	0.57	**2.02**	0.43	1.46	0.90	642
Finland	3.16	0.40	0.80	0.00	**2.19**	0.00	597
Overall	11.57	2.89	**5.96**	1.82	5.20	2.42	32,493

Notes: GB=Great Britain; UK=United Kingdom.

Most commonly outsourced tasks in boldface, second most outsourced highlighted in gray.

Tasks that were outsourced most frequently in each country are boldface, and the second most frequently outsourced tasks are highlighted in gray. For the majority of countries, the most outsourced tasks included small repairs and cleaning, with some variation. For instance, South Africa was the country with the highest rate of outsourcing any task, and the two most outsourced tasks included cleaning (20.51%) and laundry (17.43%). In Taiwan, the country with the second highest rate of outsourcing any task, the two most outsourced tasks included meals (14.03%) and

small repairs (10.90%). Still, about 9.32% of South African respondents reported outsourcing small repairs and 9.52% of Taiwanese respondents reported outsourcing cleaning, rates that are still quite high and support the overall finding that small repairs and cleaning were the most frequently outsourced.

Table 2. ISSP Weighted Country-Level Variables

	Gender Ideology	Women's Rel. to Home	Support for Women's Work	Normative Gender Roles	Proportion of HH Labor	Labor Force Participation	Educational Attainment	Proportion of HH Income
Argentina	2.79	2.51	2.62	3.32	0.73	0.42	1.80	0.40
Australia	3.24	2.90	3.28	3.53	0.65	0.58	3.63	0.38
Austria	3.13	3.09	2.97	3.42	0.71	0.57	2.82	0.37
Belgium	3.44	3.07	3.43	3.83	0.68	0.57	3.42	0.40
Bulgaria	3.09	2.65	2.99	3.64	0.72	0.54	3.66	0.40
Canada	3.40	3.13	3.44	3.62	0.63	0.51	4.18	0.36
Chile	2.90	2.69	2.61	3.53	0.77	0.40	2.44	0.34
China	3.01	2.55	3.04	3.42	0.71	0.34	1.95	0.40
Croatia	3.37	3.00	3.29	3.87	0.73	0.52	2.71	0.39
Czech Republic	3.27	2.76	3.40	3.56	0.69	0.56	2.85	0.42
Denmark	4.02	3.55	4.09	4.36	0.62	0.68	4.51	0.45
Finland	3.68	3.09	3.82	4.01	0.64	0.67	3.96	0.43
France	3.63	3.17	3.57	4.16	0.71	0.62	3.45	0.39
GB and/or UK	3.37	2.97	3.44	3.64	0.64	0.57	3.25	0.47
Germany	3.62	3.43	3.60	3.83	0.71	0.51	4.04	0.28
Hungary	2.96	2.55	2.99	3.30	0.72	0.51	2.80	0.43
Iceland	3.75	3.14	3.92	4.09	0.64	0.73	3.87	0.39
India	2.88	2.57	2.83	3.27	0.55	0.35	1.83	0.52
Ireland	3.37	3.03	3.40	3.67	0.68	0.55	3.77	0.40
Israel	3.29	3.21	2.98	3.87	0.72	0.62	3.40	0.39
Japan	3.29	2.53	3.70	3.42	0.84	0.54	3.41	0.24
Latvia	2.91	2.53	2.91	3.27	0.64	0.60	4.01	0.42
Lithuania	3.06	2.92	2.98	3.30	0.68	0.58	3.76	0.41
Mexico	2.81	2.56	2.55	3.42	0.69	0.49	2.19	0.28
Netherlands	3.43	3.46	3.27	3.65	0.68	0.52	3.36	0.34
Norway	3.75	3.51	3.67	4.08	0.65	0.71	3.75	0.41

Table 2. ISSP Weighted Country-Level Variables, concl.

	Gender Ideology	Women's Rel. to Home	Support for Women's Work	Normative Gender Roles	Proportion of HH Labor	Labor Force Participation	Educational Attainment	Proportion of HH Income
Philippines	2.82	2.24	2.96	3.18	0.65	0.38	2.57	0.34
Poland	3.14	2.89	3.15	3.37	0.66	0.57	3.48	0.42
Portugal	3.33	3.07	3.12	3.90	0.76	0.52	2.30	0.44
Russia	2.90	2.61	2.90	3.17	0.66	0.55	4.08	0.38
Slovakia	3.15	2.51	3.44	3.35	0.68	0.58	2.87	0.43
Slovenia	3.52	3.03	3.52	4.00	0.75	0.50	2.93	0.43
South Africa	3.13	2.62	3.24	3.45	0.65	0.37	2.28	0.35
South Korea	2.81	2.31	2.73	3.45	0.76	0.53	3.19	0.28
Spain	3.40	3.24	3.04	4.08	0.75	0.47	2.77	0.32
Sweden	3.83	3.35	3.82	4.27	0.62	0.64	3.61	0.41
Switzerland	3.18	2.77	3.21	3.53	0.74	0.58	3.71	0.32
Taiwan	3.07	2.18	3.41	3.44	0.75	0.57	2.78	0.34
Turkey	2.76	2.41	2.68	3.22	0.75	0.11	1.56	N/A
United States	3.21	2.74	3.32	3.52	0.65	0.54	3.68	0.39
Venezuela	3.04	2.97	2.78	3.51	0.60	0.38	3.49	0.42
Total Countries with Data	41	41	41	41	41	41	41	40

Note: HH=household; ISSP= International Social Survey Programme; Rel.=relationship.

Respondents from the United States reported an average amount of outsourcing any task (9.90%), with cleaning (5.72%) most frequently reported and then small repairs (3.39%). Other countries with about the same frequency of outsourcing any task as the United States, plus or minus 2%, included Bulgaria (11.63%), the Netherlands (11.07%), Canada (10.77%), Switzerland (9.61%), Australia (8.82%), Germany (8.76%), Croatia (8.54%), and Hungary (8.31%). Cleaning and small repairs were also the most common types of outsourced tasks in these countries, with the exception of Bulgaria and Croatia, where meals were the second most likely tasks to be outsourced (1.55% and 2.29% respectively), and Hungary, where laundry was the second mostly likely to be outsourced (1.84%).

The lowest rates of outsourcing any task were reported in Japan (4.96%), Iceland (4.75%), Lithuania (4.50%), Russia (3.98%), and Finland (3.16%). Cleaning and small repairs remained the most commonly outsourced tasks,

despite the low rate of outsourcing any task in these countries. As was evident throughout the data, there was some variation in the most frequently outsourced tasks, even among the countries reporting the least outsourcing. Specifically, the second most outsourced task in Japan was meals (1.65%) and in Lithuania, laundry (0.72%).

Table 3. Appended Country-Level Measures

	GII	Gini Index	% Low-Skill Working Age	% Low-Skill Immigrant Working Age
Argentina	0.37	41.30	41.42	N/A
Australia	0.14	34.70	23.60	14.00
Austria	0.13	30.50	17.10	26.60
Belgium	0.11	27.50	28.40	33.60
Bulgaria	0.25	36.00	18.15	N/A
Canada	0.14	33.50	11.00	7.50
Chile	0.37	46.00	42.30	20.10
China	0.21	42.20	75.50	N/A
Croatia	0.36	32.50	N/A	N/A
Czech Republic	0.14	26.10	7.60	12.80
Denmark	0.06	27.80	22.10	21.20
Finland	0.08	27.10	15.20	N/A
France	0.11	33.10	27.50	37.90
GB and/or UK	0.21	33.10	21.90	N/A
Germany	0.09	31.10	13.70	32.00
Hungary	0.24	30.80	17.90	14.80
Iceland	0.10	26.80	29.20	N/A
India	0.62	35.70	84.89	N/A
Ireland	0.20	33.20	25.40	9.40
Israel	0.15	41.60	15.50	10.60
Japan	0.12	32.10	N/A	N/A
Latvia	0.22	35.20	10.90	7.70
Lithuania	0.19	35.10	6.70	3.20
Mexico	0.45	48.70	66.00	26.90

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Table 3. Appended Country-Level Measures, concl.

	GII	Gini Index	% Low-Skill Working Age	% Low-Skill Immigrant Working Age
Netherlands	0.05	27.60	26.60	28.40
Norway	0.08	25.70	18.00	N/A
Philippines	0.43	46.50	N/A	N/A
Poland	0.16	33.00	10.40	4.50
Portugal	0.14	36.00	62.40	31.80
Russia	0.34	40.70	7.00	N/A
Slovakia	0.19	26.10	8.30	9.80
Slovenia	0.18	25.60	15.00	23.00
South Africa	0.49	63.40	32.20	N/A
South Korea	0.11	31.60	17.50	N/A
Spain	0.12	35.40	45.30	40.50
Sweden	0.05	27.60	12.50	31.40
Switzerland	0.07	31.60	14.30	24.30
Taiwan	N/A	N/A	N/A	N/A
Turkey	0.44	40.20	66.10	N/A
United States	0.30	40.90	10.70	23.50
Venezuela	0.45	44.80	N/A	N/A
Total Countries with Data	40	40	36	24

Note: GII=Gender Inequality Index.

Before assessing correlations between the country-level measures of gender inequality, class-based inequality, and outsourcing, I descriptively review the country-level measures. Specifically, Table 2 displays the weighted country-level means generated using the ISSP data, including gender ideology measures, female partners' proportion of household labor, labor force participation, proportion of household income, and educational attainment.

As it relates to the overall gender ideology score, Denmark displayed the most liberal attitudes overall (4.02) and for the subindices that measured women's relationship to home (3.55), support for women's work (4.09), and normative gender roles (4.36). On the other hand, Turkey showed the most conservative attitudes overall (2.76), Taiwan the most conservative attitudes

relative to women's relationship to home (2.18), Mexico the most conservative attitudes regarding support for women's work (2.55), and Russia the most conservative attitudes about normative gender roles (3.17). Compared to the other countries, the United States was average relative to overall gender ideology (3.21, 21st most liberal of 41), women's relationship to home (2.74, 25th most liberal of 41), support for women's work (3.32, 17th most liberal of 41), and normative gender roles (3.52, 23rd most liberal of 41).

Female partners completed the lowest percentage of household labor in India (0.55) and the highest in Japan (0.84). Female partners were least likely to participate in the paid labor force in Turkey (0.11) and the most likely in Iceland (0.73). Female partners' educational attainment was lowest in Turkey (1.56) and highest in Denmark (4.51). Lastly, female partners' proportion of household income earned was lowest in Japan (0.24) and highest in India (0.52). The proportion of household labor completed by female partners was on the lower end of the range for the United States (0.65, 32nd highest of 41), labor force participation was about average (0.54, 21st highest of 41), educational attainment was on the higher end of the range (3.68, 12th highest of 41), and proportion of household income was about average (0.39, 21st highest of 40).

Table 3 displays the GII, Gini index, percentage of low-skill working-age adults, and percentage of low-skill immigrant working-age adults. Higher scores on the GII represent more inequality, with scores ranging from 0.05 for Sweden and the Netherlands, the most egalitarian countries in this analysis, to 0.62 for India, the least egalitarian country. Relative to income inequality as measured by the Gini index, Slovenia (25.60) was the most equal and South Africa (63.40) the most unequal. India had the highest proportion of low-skill workers (84.89), and Lithuania (6.70) the lowest. Further, Spain had the highest proportion of low-skill immigrant workers (40.50), and Lithuania (3.20) the lowest. The United States was on the higher end of the range relative to the GII (0.30, 11th highest of 40) and the Gini index (40.90, 9th highest of 40), the lower end of the range for the percent of low-skill working-age adults (10.70, 31st highest of 36), and average for the percent of low-skill working-age immigrant adults (23.50, 11th highest of 24).

Correlation Matrix

The first column of Table 4 displays all correlations with outsourcing any task, with significant relationships bolded. All other columns display correlations between the country-level measures of gender and class-based inequality, with significant relationships highlighted in gray. Beyond their relationship to outsourcing, I discuss how the country-level measures relate to one another where it provides insight into this study's research questions.

Table 4. Correlation Matrix of Country-Level Variables

	Outsourcing	GII	Gender Ideology	Women's Relationship to Home	Support for Women's Work	Normative Gender Roles	Proportion of Household Labor	Labor Force Participation	Educational Attainment	Proportion of Household Income	% Low-Skill Working Age	% Low-Skill Working Age Immigrant	Gini Index
Outsourcing	1.000 N=41												
GII	0.423** N=40	1.000 N=40											
Gender Ideology	-0.298 N=41	-0.685*** N=40	1.000 N=41										
Women's Rel. to Home	-0.277 N=41	-0.609*** N=40	0.845*** N=41	1.000 N=41									
Support for Women's Work	-0.308* N=41	-0.639*** N=40	0.903*** N=41	0.571*** N=41	1.000 N=41								
Normative Gender Roles	-0.156 N=41	-0.582*** N=40	0.905*** N=41	0.799*** N=41	0.694*** N=41	1.000 N=41							
Proportion of Household Labor	0.116 N=41	-0.207 N=40	-0.190 N=41	-0.241 N=41	-0.182 N=41	-0.062 N=41	1.000 N=41						
Labor Force Participation	-0.337* N=41	-0.715*** N=40	0.645*** N=41	0.496*** N=41	0.639*** N=41	0.536*** N=41	-0.161 N=41	1.000 N=41					
Educational Attainment	-0.541*** N=41	-0.612*** N=40	0.579*** N=41	0.519*** N=41	0.576*** N=41	0.394* N=41	-0.291 N=41	0.735*** N=41	1.000 N=41				
Proportion of Household Income	-0.158 N=40	0.144 N=39	0.149 N=41	0.160 N=40	0.117 N=40	0.119 N=40	-0.586*** N=40	0.120 N=40	-0.021 N=40	1.000 N=40			
% Low-Skill Working Age	0.490** N=36	0.558*** N=36	-0.334* N=36	-0.266 N=36	-0.419* N=36	-0.134 N=36	0.108 N=36	-0.654*** N=36	-0.761*** N=36	0.058 N=35	1.000 N=36		
% Low-Skill Working-Age Immigrant	0.407* N=24	-0.236 N=24	0.411* N=24	0.440* N=24	0.175 N=24	0.608*** N=24	0.366 N=24	-0.168 N=24	-0.270 N=24	-0.411* N=24	0.517** N=24	1.000 N=24	
Gini index	0.681*** N=40	0.724*** N=40	-0.580*** N=40	-0.469*** N=40	-0.591*** N=40	-0.449*** N=40	-0.023 N=40	-0.596*** N=40	-0.445*** N=40	-0.230 N=39	0.410** N=36	-0.043 N=24	1.000 N=40

Notes: GII=Gender Inequality Index; Rel.=relationship.

*p < .05 **p < .01 ***p < .001

The first rows in Table 4 include measures of gender inequality, gender attitudes, and female partner averages. The GII was significantly and positively correlated with outsourcing (0.423, $p < .01$), meaning that rates of outsourcing were higher in less egalitarian countries. All gender ideology measures were negatively correlated with outsourcing, meaning that outsourcing was less common as gender attitudes became more liberal. Even so, only the "support for women's work" subscale was significantly related to outsourcing (–0.308, $p < .05$). It is worth noting that the GII, the overall measure of gender ideology, and the gender ideology subindices were significantly related to other country-level measures, including women's labor force participation, women's level of education, and the Gini index, demonstrating that these gender attitudes were embedded in country-level contexts.

Female partners' proportion of household labor was positively correlated with outsourcing, meaning that outsourcing was more common when female partners completed a greater share of the family's housework, although this relationship did not reach significance. Female partners' proportion of household labor was more strongly and negatively correlated with female partners' proportion of household income, following the findings of past research (Bittman et al. 2003; Gupta 2006, 2007; Killewald and Gough 2010; Schneider 2011).

Interestingly, female partners' labor force participation, educational attainment, and proportion of household income were all negatively correlated with outsourcing. In other words, outsourcing was less common in countries marked by higher rates of female labor force participation, educational attainment, and contributions to household earnings. Still, only female partners' labor force participation (–0.337, $p < .05$) and educational attainment (–0.541, $p < .001$) reached significance. As noted above, female labor force participation and educational attainment also correlated with the GII and gender ideology measures. Further, female labor force participation and educational attainment were also strongly, and positively, correlated with each other (0.735, $p < .001$).

Lastly, as expected, the measures of class-based inequality were all positively correlated with outsourcing: percent low-skill working-age adults (0.490, $p < .01$), percent low-skill immigrant working-age adults (0.407, $p < .05$), and Gini index (0.681, $p < .001$). These findings suggest that outsourcing was more common in countries marked by higher class-based inequality. The GII and the gender ideology measures consistently correlated with these measures of class-based inequality, although not all correlations reached significance. These measures also correlated with female labor force participation, educational attainment, proportion of household income, and each other, although not all relationships were significant.

DISCUSSION

This study investigated outsourcing overall and for five tasks in 41 countries using cross-national data from the 2012 ISSP Family and Changing Gender Roles IV

Module. I found that about 12% of families overall reported outsourcing any type of household labor measured in this study (laundry, small repairs, groceries, cleaning, and meals), with the most commonly outsourced tasks including small repairs (about 6%) and cleaning (about 5%). The flip side of this finding is that the majority of families (about 88%) captured in this data did not report outsourcing any of these household tasks, supporting my first hypothesis, that outsourcing may be more of an exception than a norm. This finding is interesting, as it speaks to previous literature on the division of household labor that suggests that even when families have the financial resources to outsource, many choose not to (Sullivan and Gershuny 2013). Although outsourcing household labor might reduce demands at home, housework itself may be laden with gendered understandings and be one way for men and women to "do gender" (Kornrich 2012; West and Zimmerman 1987).

When viewed across countries, the data showed expected variation in reports of outsourcing. There were a few notable trends in the data, including that outsourcing was much more common than average in some countries, such as South Africa, where almost 30% of respondents outsourced at least one of the measured tasks, or Taiwan, where about 27% did the same. On the other end of the spectrum, outsourcing was much less common in other parts of the world, such as Finland, where about 3% of respondents reported outsourcing at least one measured task, or Russia, where about 4% outsourced. Within this large range were "average" countries such as Austria, Bulgaria, the Netherlands, Canada, the United States, and Switzerland, where overall rates of outsourcing fell within two percentage points of the mean for all countries (11.57%). Clearly, given this variation, outsourcing was embedded in country context, which I further investigated in a correlation analysis. Although there were some exceptions, small repairs and cleaning were the most frequently outsourced tasks across countries, demonstrating less variation in types of tasks commonly outsourced than rates of outsourcing overall.

The correlation analysis provided context to this country-level analysis. I anticipated that outsourcing would be more common in gender-egalitarian countries, given that female partners might have more bargaining power in these contexts (Fuwa 2004). Instead, the data showed a negative relationship between measures of gender inequality and outsourcing, suggesting that outsourcing was actually more common where the status of women was lower or where gender attitudes, specifically those related to women's work, were more conservative. This pattern held relative to female partners' labor force participation and educational attainment, with more outsourcing in contexts where women were less likely to work or completed less education. Although unexpected, this finding may suggest that negotiations about outsourcing operate differently than those about housework. Whereas women's higher status in countries that are more gender egalitarian may help them redistribute housework to their male partners, women's lower status in less egalitarian countries may make outsourcing housework to third parties a more

effective strategy. Said differently, where women cannot bargain out of housework, they might be able to buy out of it. Of course, this possibility also reflects a limitation of this data: specifically, that it is unclear if the household labor was being outsourced to paid or unpaid third parties.

Beyond gender inequality, Estevez-Abe's (2015) work suggested that the proportion of a country's labor force that was low-skilled, presumably measuring the supply of domestic workers, might also set the stage for outsourcing. My data supported this finding, with outsourcing significantly and positively correlated with the percent of low-skill working-age adults within countries. Further, although past research did not find a significant relationship between outsourcing and income inequality as measured by D9/D1 ratios (Estevez-Abe 2015), the findings of this research suggested that income inequality as measured by the Gini index is significantly and positively correlated with outsourcing, supporting my hypothesis. In summary, just as outsourcing was more common in countries marked by more gender inequality, it was also more common in countries with more class-based inequality. As previous research suggests, class-based inequality may make outsourcing possible, providing a labor force of domestic workers to whom household tasks can be outsourced. High income inequality in a country might also indicate a supply of wealthy families who might have the financial resources to support paid outsourcing. Beyond these possibilities, however, class-based and gender-based inequalities were intertwined. In the correlation analysis, for example, the Gini index showed significant and strong correlations with many measures of gender inequality, making it difficult to completely disentangle the impact of these systems of disadvantage.

This research fills a gap in the social science literature by examining rates of outsourcing cross-nationally as well as understanding how broader country contexts shape the practice of outsourcing; nevertheless, this research is not without limitations. As I mentioned above, the measurement of outsourcing in this data does not specify to whom the work is being outsourced and if the outsourcing is paid or unpaid. Future studies, especially those aimed at collecting cross-national data, should consider incorporating direct measures of outsourcing to better gauge who is doing the housework and the economic implications of outsourcing.

Further, many questions are left unanswered, especially those related to individual families, not countries, that can be investigated with ISSP data. First, what family characteristics are related to outsourcing? For instance, future studies might look at how a family's economic resources, family and work demands, and individual-level gender attitudes shape outsourcing practices. Next, future studies can investigate if outsourcing reduces time spent on housework or creates more equality in the division of household labor. Finally, future research might examine the relationship between outsourcing and the perceptions of equity in the division of household labor. Although all these questions are feasible with data from any

one population, scholars who use cross-national data can further account for country contexts such as gender- and class-based inequality in their analyses. Scholars conducting multilevel analyses using measures of gender- and class-based inequalities should consider the relationships shown in this study. Beyond their correlation to outsourcing, the country-level measures showed a great deal of conceptual overlap and need to be selected parsimoniously so as not to violate assumptions of multicollinearity in regression analyses.

Beyond what is possible with the ISSP or similar quantitative datasets, future research might also seek to understand why and how families choose to (or not to) outsource household labor, how family members make sense of this decision, and the outcomes of outsourcing for family life. Questions like these would best be answered with qualitative data that can richly describe the processes and meaning involved in such decisions.

NOTES

1. Although these findings extend beyond the scope of this research, previous studies also investigated the proportion of low-skill immigrant workers, again a proxy for supply of domestic workers, in a country's population as it relates to the likelihood of women participating in the labor force (Barone and Mocetti 2011; Cortés and Pan 2013; Cortés and Tessada 2011; Farrè et al. 2009; Furtado and Hock 2008). From the perspective of the care workers to whom household tasks are outsourced, another topic beyond the scope of this investigation, Milkman et al.'s (1998) study suggested that income inequality, the proportion of the female labor force made up of African Americans and Latinas, the proportion of the female labor force that is foreign-born, and maternal labor force participation positively affect the percentage of women employed in domestic labor.

2. Beyond these country-level measures, many others have been utilized in research about housework, including the Global Gender Gap (GGI) and its subindices produced by the World Economic Forum (Greenstein 2009), country-level cohabitation rates (Batalova and Cohen 2002; Geist and Cohen 2011), social policy indicators (Chang 2000; Fuwa and Cohen 2007), gross domestic product, the diffusion of various household technologies (Heisig 2011), and the percentage of wives working weekend hours (Ruppanner and Treas 2015).

3. Countries in the full data set include Argentina, Australia, Austria, Belgium, Bulgaria, Canada, Chile, China, Croatia, Czech Republic, Denmark, Finland, France, Germany, Great Britain, Hungary, Iceland, India, Ireland, Israel, Japan, Latvia, Lithuania, Mexico, the Netherlands, Norway, the Philippines, Poland,

Portugal, Russia, Slovenia, Slovakia, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Turkey, the United States, and Venezuela.

4. The ISSP collected Family and Changing Gender Roles V data in 2022, but this data will not be fully released until the summer of 2025, making the 2012 data set the most recent (ISSP n.d.).

5. ISSP respondents reported their own sex but did not report the sex of their spouse or partner. I assumed couples were heterosexual and comprised a female and a male partner, although this assumption was likely not correct in all cases.

6. Respondents from Denmark, Great Britain, and Taiwan were not asked "Do you have a spouse or a steady partner and, if yes, do you share the same household?" To keep respondents from these countries in the analysis, I did not drop cases from these countries on this variable.

7. Respondents from Turkey were not asked, "Including yourself, how many people usually live in your household?" To keep respondents from Turkey in the analysis, I did not drop cases from this country on this variable.

8. I excluded care work (child and elder care) because the outsourcing of care work is most likely driven by necessity (for example, if both spouses work) rather than choice (Weagley and Norum 1989; Yang and Magrabi 1989). Further, research suggests that time-use trends in housework and care work are divergent. For instance, although the average hours spent on routine housework has fallen for most households, there has been no parallel decline in average hours spent on childcare (Bianchi et al. 2012). Instead, both women and men increased the time spent on childcare, from 7.3 hours for women and 2.4 hours for men in 1975 to 13.7 hours for women and 7.2 hours for men in 2009/2010 (Bianchi et al. 2012).

9. Chile, Ireland, Israel, Latvia, and Norway collected spouses' educational attainment on a different scale: (0) "No formal education," (1) "Lower formal qualification," (2) "Above lowest qualification," (3) "Higher secondary completed," (4) "Above higher secondary completed," (5) "University degree completed." I merged these responses with those from the internationally comparable 6-point scale most countries used. Specifically, (0) "No formal education" = (0) "No Formal Education"; (1) "Lower formal qualification" = (1) "Primary School (elementary school)"; (2) "Above lowest qualification" = (2) "Lower Secondary (does not allow entry to university)"; (3) "Higher secondary completed" = (3) "Upper Secondary (allows entry to university)"; (4) "Above higher secondary completed" = (4) "Post-Secondary, Non-Tertiary (other upper secondary programs toward labor market or technical formation)"; and (5) "University degree completed" = (5) "Lower Level Tertiary, first stage (also technical schools at a tertiary level)."

10. Austria, Bulgaria, Great Britain, Russia, and South Africa did not collect data on spouses' educational attainment. Female partners' education was therefore measured only with female respondents' reported highest level of education.
11. Spain's data were missing the middle category, "Neither agree nor disagree," for the gender ideology questions. Possible responses included (1) *Strongly Agree*, (2) *Agree*, (3) *Disagree*, and (4) *Strongly disagree*. To deal with this inconsistency, I recoded these responses so they more closely matched the response categories from other countries, using the following coding scheme: (1) *Strongly Agree*, (2) *Agree*, (4) *Disagree*, and (5) *Strongly Agree*.
12. Respondents who indicated "Can't choose" on any gender ideology question were counted as missing for that question.
13. In analyses not shown here, I also reviewed correlations between the World Economic Forum's Global Gender Gap Index (GGI) and outsourcing (Hausmann, Tyson, and Zahidi 2012). Except for the Health and Survival subindex, the GGI was not significantly correlated with outsourcing. Still, the GGI was highly correlated with the GII measure included in this study. For parsimony, I chose to exclude the GGI in favor of the GII.

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APPENDIX A: MEASURING GENDER ATTITUDES

Knight and Brinton (2017:1487) argue that gender attitudes may be more complex than what is captured in "conventional approaches" that place attitudes on a "linear continuum from traditionalism to liberal egalitarianism." The authors use data from the World Values Survey (WVS) and European Values Survey (EVS) that include a fairly common set of gender attitude measures:

> (Q1) "A woman has to have children in order to be fulfilled."
> (Q2) "A working mother can establish just as warm and secure a relationship with her children as a mother who does not work."
> (Q3) "Being a housewife is just as fulfilling as working for pay."
> (Q4) "Both husband and wife should contribute to the household income."
> (Q5) "A job is all right but what most women really want is a home and children."
> (Q6) "Having a job is the best way for a woman to be an independent person."
> (Q7) "When jobs are scarce, men have more right to a job than women."[1]

The authors state that these questions tap into "attitudes about egalitarianism in the labor force . . . women's 'essential' natures as mothers and wives . . . [and] the notion of individual choice/normative imperative in taking on certain roles" (Knight and Brinton 2018:1495–96). In short, the questions capture attitudes about women's place in the home and workplace, as well as attitudes about normative gender roles.

Table A1. Four Classes of Gender Attitudes

	Home		Work	Normative Gender Roles	
	Women's Desires (Q5) "A job is all right, but what women really want is a home and children."	**Women's Fulfillment** (Q1) "A woman has to have children in order to be fulfilled." (Q3) "Being a housewife is just as fulfilling as working for pay."	**Support for Women's Work.** (Q2) "A working mother can establish just as warm and secure a relationship with her children as a mother who does not work." (Q6) "Having a job is the best way for a woman to be an independent person."	**Men's & Women's Breadwinning Roles** (Q4) "Both husband and wife should contribute to the household income."	**Men's Primacy as Breadwinners** (Q7) "When jobs are scarce, men have more right to a job than women."
Class 1: Traditionalism	T	T	T	T	T
Class 2: Liberal egalitarianism	E	E	E	E	E
Class 3: Egalitarian familism	T	T	E	E	E
Class 4: Flexible egalitarianism	E	(Q1) E (Q3) T	(Q2) E (Q6) T	T	E

Note: E=egalitarian attitudes; T=traditional attitudes.

Table A2. ISSP Questions Sorted by Home, Work, and Normative Gender Roles

Beliefs by Social Sphere		ISSP Questions
Home	Women's desires	**(Q4) "A job is all right, but what most women really want is a home and children."**
	Women's fulfillment	**(Q5) "Being a housewife is just as fulfilling as working for pay."**
Work	Support for women's work	**(Q1) "A working mother can establish just as warm and secure a relationship with her children as a mother who does not work."**
		(Q2) "A pre-school child is likely to suffer if his or her mother works."
		(Q3) "All in all, family life suffers when the woman has a full-time job."
Normative gender roles	Men's & women's breadwinning roles	**(Q6) "Both the man and woman should contribute to the household income."**
	Men's primacy as breadwinners/women's as caretakers	**(Q7) "A man's job is to earn money; a woman's job is to look after the home and family."**

Note: Boldface ISSP questions are the same or similar to the questions included in the World Values Survey and European Values Survey data used by Knight and Brinton (2017).

Using these indicators, they perform a latent class analysis and identify four classes of gender attitudes, shown in Table A1. Beyond the two anticipated classes of traditionalists and liberal egalitarians whose attitudes follow expected patterns relative to home, work, and normative gender roles and are easily measured with conventional approaches, the authors identify two additional classes: egalitarian familism and flexible egalitarianism. Those grouped into egalitarian familism are similar to liberal egalitarians but hold more-traditional attitudes about women's desires and source of fulfillment in the home sphere. Those grouped into flexible egalitarianism hold a mixture of egalitarian and traditional attitudes, seemingly

rejecting all attitudes that proscribe gender behaviors both in the home and workplace. For this reason, this group represents the most complicated combination of gender attitudes.

Once Knight and Brinton (2017) identify the four classes of gender attitudes, they examine demographic and attitudinal correlates as well as how membership in these classes varies by country and has changed over time. They conclude that, rather than convergence to one form of liberal egalitarianism, "divergence and persistence" better describe the ways in which gender attitudes have changed over time within the 17 postindustrial European countries they studied (Knight and Brinton 2017:1520).

Although the purpose of my research is not a latent class analysis to group individuals by similarities in gender attitudes, my research benefits from Knight and Brinton's (2017) analysis by taking into account the fact that attitudes about women's place in the home and the workplace, as well as relative normative gender roles, may vary for each individual. I therefore tested multiple measures of gender attitudes in these analyses. First, I tested the conventional measure of gender attitudes, grouping attitudes about home, work, and normative roles together on a continuum that ranges from conservative to liberal. Second, I tested separate home, work, and normative gender role subscales on similar continuums ranging from conservative to liberal. Table A2 describes which ISSP gender ideology questions belonged to each group.

APPENDIX NOTE

1. The ISSP gender ideology questions include (Q1) "A working mother can establish just as warm and secure a relationship with her children as a mother who does not work"; (Q2) "A pre-school child is likely to suffer if his or her mother works"; (Q3) "All in all, family life suffers when the woman has a full-time job"; (Q4) "A job is all right, but what most women really want is a home and children"; (Q5) "Being a housewife is just as fulfilling as working for pay"; (Q6) "Both the man and woman should contribute to the household income"; and (Q7) "A man's job is to earn money; a woman's job is to look after the home and family." The ISSP gender ideology questions do not include the following from the WVS and EVS: (Q1) "A woman has to have children in order to be fulfilled"; (Q6) "Having a job is the best way for a woman to be an independent person"; and (Q7) "When jobs are scarce, men have more right to a job than women." On the other hand, the Q2 ("A pre-school child is likely to suffer if his or her mother works"), Q3 ("All in all, family life suffers when the woman has a full-time job"), and Q7 ("A man's job is to earn money; a woman's job is to look after the home and family") are unique to the ISSP data.

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