

# **Within-couple distribution of economic resources: A critical review of extant studies and avenues for future research<sup>1</sup>**

## **1. Introduction**

This article aims at providing a critical review of the main strands of research regarding the within-couple distribution of economic resources produced since the late 1950s by scholars of economics and sociology. How economic resources are brought into the household and shared between partners has significant implications for women, who – worldwide – are still largely economically dependent on their partners and rely on some form of internal transfer of resources (i.e. sharing). This dependency is found in developing countries (see for example Ashraf, 2009 on the Philippines; Fuwa et al., 2006 on India; and Bargain et al., 2018 on South Africa) as well as several European countries (Del Boca, Wetzels, 2007; Dotti Sani, 2018; Esping-Andersen, 2009), the United States (Bertrand et al. 2015; England, 2005) and other industrialized countries such as Australia (Baxter, Hewitt, 2013) and Canada (Fox, Moyser, 2018). Lack of control over economic resources can severely impact the distribution of power between partners. Money often equates to options outside of the relationship, and prior studies reveal how women's control over income leads to their higher consumption and expenditure rates (Bourguignon et al. 1993; Phipps, Burton, 1998), increased well-being (Bonke, Browning, 2009) and higher spending on children (Lundberg et al. 1996). The failure to recognize the effect of gender on unequal access to economic resources may seriously bias the measurement of poverty, and official statistics may underestimate the real poverty of particularly vulnerable household members, such as women and children (Findlay, Wright, 1996). Moreover, the individual ownership of economic assets has consequences for other domains of family life, such as household labour or leisure (Brines, 1994).

The intra-household allocation of economic resources has been extensively studied since the second half of the 20<sup>th</sup> century. Thus, the first contribution of this article is to assess the

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development of this literature through the lens of gender and elucidate the links, similarities and differences between the various theories brought forth. Second, our review challenges existing theories by posing several research questions: How have changes in women's education and employment over the past few decades influenced the dominant theoretical approaches to the study of intra-household distribution of economic resources? How has the existence of different preferences and goals within couples been theoretically elaborated? How have the macro- and meso- contexts been integrated in the analysis of decision making processes of couples? Finally, how have heterogeneity and diversity across couples been theoretically accounted for? These questions are answered by reviewing relevant literature in the context of Western industrialized societies, particularly in Europe and the United States.

Previous articles have proposed field-specific reviews of the literature and highlighted selected theoretical approaches stemming either from economics or sociology (Bennett 2013; Donni, Chiappori, 2011; Himmelweit et al. 2013). In contrast, this article goes beyond previous research by presenting rational choice models from economics and the sociological literature on the topic as two bodies of literature that complement one another. In terms of outcomes of the study, by critically reflecting on the limitations of current theoretical stances, the article moves the field forward by identifying promising avenues that have not been sufficiently explored so that future research may integrate them in studies of the sharing of economic resources within households.

While recognizing the rich empirical evidence concerning intra-household sharing in developing countries (see for example the recent studies by Ashraf, 2009; Fuwa et al., 2006; and Bargain et al., 2018), we decided to narrow our reference framework to Western industrialized countries, essentially those in Europe and the United States, that share comparable levels of human and economic development. High levels of economic inequality and poverty in developing countries, as well as substantial gender inequalities, call for a separate and systematic investigation of the issue of the sharing of economic resources there.

The proposed research questions guide the organization of our review article, which is divided into two main parts. The first is devoted to a review of three dominant theoretical approaches to the study of the intra-household sharing of economic resources: (a) early unitary models of family behaviour in economics and sociology (Parsons, Bales, 1956; Samuelson 1956; Becker 1973; 1974; 1981a;); (b) bargaining theories and the relative resources approach (Blood, Wolfe, 1960; Brines 1994; Manser, Brown, 1980; McElroy, Horney, 1981; Lundberg, Pollak, 1993); and (c) the transaction costs, collective investments and collective goods approaches (Feller 1973; Pollak 1985; Treas 1993; Williamson 1981). In the second part, we suggest ways in which novel perspectives, such as preference theory (Hakim 2000); theories on the role of social contexts (Agarwal 1997; Esping-Andersen 2009); or cultural explanations (Loscocco, Walzer, 2013; Ridgeway, Kricheli-Katz, 2013) can shed light on intra-couple behaviour. Table 1 provides a summary of the content, structure and contributions of the article.

[Table 1 here]

## **2. The three cornerstones of household sharing**

### *Unitary models of family behaviour*

The first models of family behaviour developed in the 1950s were *unitary models*, which assumed that the family operates on the basis of shared preferences and common goals to which all members contribute with different means. Historically, the model was supported at the societal level by the so-called «breadwinner» or «family» wage, an income that was sufficient to cover the costs sustained by, and provide benefits to, an employed man and his family, and would therefore indirectly benefit women in their role as dependent wives and mothers (Humphries, 1982; Pateman, 1989). The male breadwinner model dominated in Western Europe and the United States during the course of the 20<sup>th</sup> century (Sorensen, McLanahan, 1987; Creighton, 1996; Lewis 2001) and was «buttressed by the institutional separation of women from both the political, and much of the economic, spheres of human activity» (Crompton et al., 2007, 3).

Sociologist Talcott Parsons was the first to propose an ideal model of the family that reflected and justified this type of household arrangement (Parsons, Bales, 1956). The core of Parsons's theory was sex-role specialization between spouses. In his view, women played an expressive role in the family by offering emotional support, while men played an instrumental role by providing the means of living. While men were expected to work, women's employment was welcome only to the extent that it did not change the standard allocation of obligations. One of the main norms that regulated the interaction between family members in the Parsonian model was equal access to family financial resources by both husbands and wives (Cheal, 1999).

Parsons's unitary approach was further developed in economics by Samuelson (1956) and Becker (1981a). Samuelson (1956) suggested that family members, by consensus, *maximize the joint function of their individual consumption*. This means that family members have individual expenditure preferences they would fulfil if they lived on their own, but they adjust them to meet common household expenditures. Becker's work represents a continuation of Samuelson's joint function of the household, but he further developed the theory of marriage by arguing that individuals have their own utility and may therefore disagree on how to allocate the benefits from marriage (Becker 1973; 1974). According to Becker, household members were assumed to rationally take on specialized roles, based on their relative productivities, with the goal of increasing overall household utility. The fundamental assumption of the theory was that the head of the family would be altruistic in *his* distribution of family resources. Altruism is assumed because caring for family members distinguishes households from other environments (Becker 1981b). Under certain income constraints, the family head would decide all income transfers and everyone's expenditures to guarantee equal financial well-being to all family members. Issues of inequality or conflict within the family were not ignored in Becker's analysis, but they were not considered especially problematic, as long as they were internalized within the utility maximization process. Becker assumed that specialization would minimize potential conflicts within families by creating dependencies between wives and husbands and by stimulating efficiency.

### *Bargaining theories and the relative resources approach*

There is accumulated empirical evidence that has contradicted the unitary framework, providing support for forms of negotiation in the household. This evidence led to the development of *independent decision-making models* within the New Home Economics approach (Grossbard 2011), non-unitary models in economics and relative resources theories in sociology (Blood, Wolfe, 1960; Manser, Brown, 1980; McElroy, Horney, 1981; Brines 1994), which complemented rather than replaced unitary models (Grossbard-Shechtman 2001). Independent individual models of decision making, as well as bargaining and relative resource theory, do not assume joint decision making in families (Grossbard, 2011). Instead, partners rely on their individual endowments, such as education and income, to reach a compromise on the decisions that affect the household.

To explain intra-household relations from this perspective, economists have relied on applied game-theoretic models, namely *cooperative*, *non-cooperative* and *collective* models. Cooperative models assume efficiency in the allocation of resources within relationships, where efficiency is defined as a state where any improvement in one partner's well-being will negatively affect that of the other partner (Browning, Chiappori, 1998). They also assume the existence of a threat point, at which «outside» options are just as attractive as the «inside» options available if one stays within the partnership. A second group of game-theoretic models extends its focus to include the principle of non-cooperation (Kanbur, Haddad, 1994; Browning, Lechene, 2001; Lundberg, Pollak, 2003). Here, both partners autonomously decide on the commonalities they want to provide and share, while at the same time maximizing their own financial well-being independently of their partner's behaviour. These models do not set efficiency as a requirement. Lastly, collective models (Chiappori 1988; 1992) feature efficiency and the presence of a *sharing rule*, which establishes the proportion of household expenditure each member receives. This sharing rule is affected by individual bargaining power as well as household preferences.

In recent years, economic research has questioned the static nature of the sharing rule in collective models and sought to explicitly model *dynamic settings*. Scholars have argued, in fact,

that the allocation of expenditure over the life-cycle depends on how bargaining power and preferences evolve over time in relation to changing opportunities (Lich-Tyler 2001; Mazzocco 2007; Himmler et al. 2013). These new models distinguish between two types of efficiency: full commitment efficiency and limited commitment efficiency. The former assumes that the original sharing rule remains intact, whereas the latter leaves open the possibility of several choice-based renegotiations of the initial agreement as the result of new opportunities. Inter-temporal renegotiation is viewed as more realistic in a contemporary couple where the constant pursuit of a «higher standard of human happiness» (Hochschild, Machung, 1989, 167) in marriage is the norm, and impacts the nature of mutual commitments.

The *bargaining view* in sociology, a direct sociological equivalent to the economic theory, takes the form of a resource theory of power. In the early 1960s, Blood and Wolfe (1960) found that women with greater economic resources have more power in the household to influence the relative share of expenditure and individual consumption. In other words, the power structure within a couple is a direct function of a woman's economic dependency (Blumstein and Schwartz, 1984; Sorensen and McLanahan, 1987). Economic dependency refers to the transfer of income in a marriage and can be best summarized as «one spouse's reliance upon the other for his or her current income standard» (Brines 1994, 657). The definition relies on the existence of a primary earner (the breadwinner, as noted above) and a secondary earner who is economically dependent on the former. The concept is often operationalized through earning transfers as the difference between partners' relative contributions to the total labour or household income (Sorensen, McLanahan, 1987; Brines 1994), by women's share of income (Bonke, Browning, 2009; Kulic, Minello, Zella, 2019) or through a categorical distinction between female breadwinner, male breadwinner and equal earner couples (Vitali and Arpino, 2016; Dotti Sani, 2018). Further research has also shown that women may benefit from distinct intellectual capabilities and achievements in employment – such as the stability of work trajectories, type of occupation and career potential – more than from income itself (Gerson 1985; Hochschild, Machung, 1989; Kulic 2014).

Resource theory mainly emphasizes the role of economic and human capital, in the form of skills and education. However, sociologists also identify beauty, sexual attractiveness and social skills as potential bargaining instruments (Safilios-Rothschild 1976; Hakim 2010). These were termed *erotic capital* by Hakim (2010), who, in a controversial theory, argued that attractiveness can be used to wield influence and that, overall, women are more endowed with erotic capital than men and thus have greater bargaining power in partnerships. This mainly occurs, according to the author, because men have a higher demand for sexual activity compared to women, giving the latter an advantage «due to the large imbalance in supply and demand in sexual markets» (Hakim, 2010, 506). While it has been argued that the leverage provided by erotic capital could be more valuable in extra-marital contexts (i.e. in love affairs or in the pre-marital phase), erotic capital can be and is used for bargaining within the marital bond (Arndt 2009).

Sociological theory has also proposed the *management of finances* within couples as a tool to understand the intra-household distribution of resources (Pahl 1989; Vogler, Pahl, 1994; Vogler 1998). The study of the financial arrangements within couples was pioneered by Jan Pahl, whose seminal work has demonstrated that individual spending patterns depend not only on household income and relative contributions of the partners, but also on the level of executive control over money in the household – i.e. access to household finances (Pahl, 1990). In her studies, Pahl demonstrated that couples manage finances in various ways and that these are consequential for the well-being of individuals within relationships (Pahl, 2000). Systems of money management among couples – so-called allocative systems – consist of various practical arrangements once money is allocated into a couple's budget. The original classification of how couples' finances are managed consists of the female whole-wage system, the male whole-wage system, the housekeeping allowance system and the joint pooling system. The diffusion of partnerships other than marriage (e.g. cohabitation, step-families, living apart together as couple relationship without cohabiting) has brought other forms of money management into the current classification. For example, in the separate management of finances regime, each partner manages their finances fully, whereas, in the

partial pooling of resources, some funds are contributed to a common pot and the remainder is managed individually (Vogler et al. 2008a). Understanding the factors that influence the executive control of money is partly a «which came first» exercise, since having direct access to economic resources, such as earnings, is likely to be an advantage in controlling them. Nevertheless, research has shown that women can have little control over economic decision making despite having their own earnings (Vogler, Pahl, 1994; Vogler et al. 2008a; Vogler et al. 2008b). The advantage of money management theory is that it provides us with an explanation that goes beyond traditional resource theory, distinguishing between who brings in (what type of) income, who spends the money and who is the end consumer (Himmelweit et al., 2013).

#### *Collective investments, collective goods and the transaction costs approach*

While bargaining reflects competitive interaction between individuals, union formation relies on *collective investments*: when people marry, they combine «individualism» with «collectivism», and not only negotiate but also invest in the new relationship. The transaction cost approach, originally developed in the early 1980s within organizational theory (Feller 1973; Williamson 1981), dealt with how firms generate efficiency by minimizing the cost of each individual transaction. It has been successfully applied to the allocation of economic resources within households.

In economics, Pollak (1985) recognized that having a common objective among family members helped them to minimize the transaction costs of family life. He argued that marriage works as a «governance structure», influencing the behaviour of family members by adding a non-market dimension to market-based, intra-family bargaining: the more objectives members have in common, the stronger the bond and the lower the transaction costs. Within this approach, individual bargaining is influenced by the collective character of the investments involved, but is not overridden by it, as occurred in the unitary approaches discussed above. Instead, the interests of household members enter the equation along with some common utility.

In sociology, the *transaction costs approach* has been used to explain efficiency gains related to the choice of household money management system. Treas argued that there are «competing pulls



between the individual and the collective» in American families (1993, 723), particularly in relation to how spouses pool their economic resources. Reasons for choosing one type of money management system over another depend on many factors but are also related to the minimization of transaction costs: couples prefer forms of organization that help them coordinate their relationship, reduce disagreements and facilitate monitoring. In other words, choosing an appropriate form of financial organization leads to more efficient relationships. For this reason, couples with high relationship investments, children and common property often choose pooling regimes to facilitate transactions (Bonke, Uldall-Poulsen, 2007). Similarly, relationships with less prior investment (e.g. unmarried or childless couples), may function better if individuals have separate responsibility for their personal finances, or alternatively if some money is collectively owned and some is private. In this view, the minimization of transaction costs represents what economists call a *collective good*, the pursuit of which is assumed to influence the extent to which individuals defend their own interests.

### **3. Revisiting the intra-couple sharing of economic resources**

#### *Preferences in a gender-equal society*

One limitation of previous research on the intra-couple sharing of economic resources is the assumption that partners have, at least to some extent, common preferences and goals that guide them in their decisions. However, growing levels of women's education and employment over the past few decades in Europe, the United States and other economically advanced countries (OECD 2019a) call for a reconsideration of this assumption. The substantial changes in what are known as work-family arrangements, that is, the «gendered patterns of breadwinning and caregiving» (Hook, 2015, 15) are highly relevant for the intra-household sharing of economic resources. In particular, the dual-earner model has become more common in Western European countries as well as in the United States (Mósesdóttir 2000; Lewis 2001; Gornick, Meyers, 2003), altering substantially the way economic resources are brought into the household. In addition, couples share unpaid labour in

a much more egalitarian way than in the past (Hook 2010); parents of both sexes are more likely than ever to spend a lot of time caring for their children (Dotti Sani, Treas, 2016); and, finally, fundamental shifts in attitudes and values have occurred, as economic modernization has brought both women and men to place value on post-material needs such as self-realization (Inglehart, Welzel, 2005). These fundamental societal changes have led to further theorizing on the role of individual, as opposed to household, preferences.

*Preference theory* and the concept of *unconstrained preferences* (Hakim 2000) provides a deeper insight into this perspective. According to this view, gender equality in Western industrialized societies has reached almost complete levels of achievement in many areas of social life. This achievement makes it possible for women to participate in society more actively than in the past, for example in terms of access to higher education and obtaining prestigious occupations. As a result, they are in the position of making lifestyle decisions based on their *individual preferences* rather than external constraints. Individual preferences would, therefore, also influence the distribution of resources within the couple.

The two main sociological contributions to preference theory consider women's preferences critical to choosing a particular life path (Gerson 1985; 2009; Hakim 2000). Both are concerned with individuals rather than households and focus on women making choices in their own best interest. Observing the new reality of American society from the 1970s onwards, Gerson (2009) distinguished between three groups of women – self-reliant (work-oriented), egalitarian (work and family-oriented) and neo-traditional (family-oriented). Each group of women relies on their preferred lifestyle, either by focusing on family, homemaking and children; paid employment; or both. In a European equivalent of Gerson's contribution, Hakim (2000) also evaluated women's choices concerning whether to work, and how much, as grounded in their preference for a certain lifestyle. In this view, preferences become prominent because equality between women and men has been reached, and women, accordingly, are truly free to choose their preferred lifestyle.

According to some versions of relative resource theory, women who choose to forego labour-related earnings are bound to a position of reduced power within the relationship. Hakim, however, emphasized that achieved educational equality between genders is likely to protect women from an unequal allocation of financial resources. From a preference theory perspective, women's economic dependence can be considered a choice that does not worsen their bargaining and financial position in the household (Sorensen 2003).

A major drawback of these approaches, in particular that of Hakim, lies in the belief that women are actually free to choose their preferred lifestyle. As McRae (2003) identified, there is little empirical evidence that women's behaviour is guided by their preferences and it is most likely that women – more than men – are faced with external constraints that force them into a lifestyle that is not their original preference. High childcare costs, for example, could coerce a work-oriented woman to stay at home to mind her children, while an unemployed partner could force a home-centred woman into employment. Even the partner's preferences regarding a woman's employment choices might have a constraining effect on her options. By focusing exclusively on the preferences of women, Hakim overlooks the constraints that might impede them from achieving their desired lifestyle.

An additional aspect that is underexplored in Hakim's theory regards men's preferences. The underlying assumption in preference theory is that if women have some degree of control over whether to work, such control is denied to men. Indeed, existing empirical evidence suggests that men are expected to work (Prentice, Carranza, 2002) and are likely to be stigmatized if they chose not to, for example by taking parental leave (Rudman, Mescher, 2013). The fact that men appear to anchor their identity to their employment more than women (e.g. men are more likely than women to suffer in the transition to retirement; see for example Barnes, Parry, 2004) could also suggest that they have internalized their role as workers to such an extent that no other choice appears admissible. Nonetheless, in the light of changes in work–family arrangements and fathering that have been documented over the past few decades (Lewis 2001; Sullivan et al., 2014; Chesley,

Flood, 2017), the study of the intra-sharing of household resources could largely benefit from a greater focus on men's preferences.

Ultimately, the very high levels of liberalization and individualization that characterize the two countries in which preference theory was developed – the United States and the United Kingdom – may support the assumption that in contemporary societies women truly have a choice of what path to follow. Nevertheless, it is hard to imagine women genuinely developing autonomous preferences in settings with much stronger norms of gender behaviour that are likely to have implications for the sharing of material resources within families. More empirical research is needed in this direction to test whether women's decisions and lifestyle preferences are actually independent of the within-couple distribution of resources, and if so in which country settings.

#### *The role of context*

Classic approaches to the intra-couple sharing of economic resources are also limited in the extent to which they ignore the wider *social context* in which couples operate. The capability framework sheds greater light on the role of context by introducing explanations as to how social constructs affect individual perceptions of worthiness. Accordingly, each person has multiple identities related to social class, gender, ethnicity, sexual identity and position within the family, among other factors, all of which influence how a person perceives their own self-interest (Sen 1990; Nussbaum 2000). Norms that guide specific communities, according to this perspective, are intrinsic to individual behaviour, and the individual perception of self-interest (e.g. woman's perception) does not necessarily correspond to the perceptions that others have for the same individual (Sen 1983). In other words, «the social and cultural conditioning of the choices that each person makes determines the individual capacity to exercise power (also) within the family» (Coelho, 2014, p.87). Therefore, the position of women in families and intra-couple relations depend on gender relations in the wider social context (Pollak 1994; Sen 1990). For example, where gender equality has not been achieved, societal constraints limit women's freedom to choose a preferred lifestyle (Vogler 1998; McRae 2003; Esping-Andersen 2009) or increase the difficulty for

women to distinguish between their own needs and those of the household (Sen 1990). Social context refers not only to structural, institutional and cultural factors at the country level, but also to meso-contexts like kin, families and networks. The following paragraphs discuss how the inclusion of a contextual perspective could enhance our understanding of the intra-couple sharing of economic resources.

*Social norms.* In mainstream economic theory, institutional factors are generally excluded and treated as exogenous. However, external factors such as breadwinning norms, gender-biased attitudes and institutions are likely to mould individual preferences and behaviour, leaving little space for a true bargaining outcome as outlined in theoretical economic models. Gender norms, as informal institutions, carry behavioural expectations for men and women and limit what can be done within the bargaining process. For this reason, the economic exchange between partners is rarely gender neutral and is often referred to as a «quasi-economic» exchange. The intra-couple distribution of resources thus requires an extension to account for these contextual factors.

First, it is often the case that women do not exercise their bargaining power within couples despite their own earnings or cultural capital, or try to soften reality by leaning on more traditional intra-couple behaviour. This would favour the theory of «gender deviance neutralization» (Brines 1994; Eirich, Robinson, 2017). A second perspective originates in the view that economically dependent men make up for their loss of masculinity by «doing gender» (West, Zimmerman, 1987; Hochschild, Machung, 1989): for instance, by refraining from traditionally female domestic duties, they reinforce traditional gender stereotypes in everyday life between sexes. In other words, men respond to the threat of women's higher bargaining power by reaffirming their «proper» gender identity (Esping-Andersen et al. 2013). Both perspectives have been tested in some recent studies (Bertrand et al. 2015; Eirich, Robinson, 2017; Hajdu, Hajdu, 2018). Yet, more research in this area is needed to fully frame the unequal allocation of resources in households in terms of a response to societal gender norms and push the field forward.

*Institutional and economic contexts.* Research on the intra-household division of economic resources has rarely acknowledged the role of state institutions in shaping household behaviour. However, if states discourage gender emancipatory initiatives or progressive policies relative to employment or active labour market participation, equal intra-household sharing within the household becomes problematic (Agarwal 1997). Thus, more comparative research is needed to understand the cross-national differences in the distribution of resources within couples. The institutional frameworks within which people find themselves often act as «filters» that affect a woman's decisions in a couple and her bargaining position in a variety of ways (Gornick, Meyers, 2003). For example, greater economic equality within couples has been found in countries that are more gender egalitarian because of their dominant welfare regime (Esping-Andersen 2009) or because of the prevalence of the dual-earner model (Gornick, Meyers, 2003). Access to employment opportunities, in particular, can determine the position of women in the household (Agarwal 1997). Policies that favour women's economic dependence have the power to discourage more active labour force participation of women through unfavourable taxation schemes for dual-earner families, lack of child care support or few job opportunities for women, in this way increasing their economic dependency (Blossfeld, Drobnič, 2001). Instead, institutional arrangements that favour egalitarianism, decommodification and universal benefits such as a minimum wage may lower women's economic dependency.

Labour market conditions and economic uncertainty can also play a role in the intra-couple distribution of resources. The recent economic crisis of 2008-2009 is an extreme example of an exogenous change in employment conditions that could impact intimate relationships. The loss of jobs in the manufacturing industry and the construction sector in the first part of the crisis, and the cuts in welfare expenditures and the public sector in the second affected first men's and then women's positions in the labour market (Bettio et al. 2012; Karamessini, Rubery, 2014). To generalize, the reduced employability of men during economic crises may bring about improvements in women's relative position in the household. However, when jobs are scarce,

traditional views about the division of labour between women and men may also reappear. Extant research suggests that during the 2008–2009 economic crisis both phenomena occurred, albeit with various outcomes in different countries and across social classes (Dotti Sani 2018). Taken together, these developments pose new and important challenges for research on the intra-household sharing of economic resources that should be addressed in future research. Their better understanding can also provide greater insights into potential generational differences across cohorts that have been exposed to different socio-economic and cultural settings.

*Meso-contexts: Kin, extended family and safety nets.* Another important limitation of bargaining theories is their failure to acknowledge the importance of family and friendship networks – such as the presence of next of kin and extended family – in the intra-couple sharing dynamics. In fact, the bargaining power of each partner will also depend on his or her outside alternatives in the form of community belonging and kinship; these can provide economic support in terms of money, but also non-economic support at the social and emotional levels (Agarwal 1997). In more traditional contexts, close family members may impose their traditional views on a woman's relationship with her husband or limit her options for divorce. However, a woman with a close family may also have «collective» power that confers greater legitimacy to her decisions on how to spend money, particularly if the family has a higher social status (Ngenzebuke et al. 2016). Various factors may play a role relative to the final effect of kinship and networks, including the social class of the immediate family, their social position, the group size and the distance of relatives (Angelucci et al. 2010). Very little research in this area exists, which is why we exceptionally resort to two examples in the context of a developing country. Ngenzebuke et al. (2016) have shown that kinship characteristics matter more than household or individual characteristics for a woman's say in decision making. On the contrary, Kazianga and Wahhaj (2017) argued that nuclear families have a more efficient allocation of consumption than extended family households, perhaps due to stronger mutual ties between partners. In research on housework, Treas (2011) found that women are less likely to seek the assistance of their husbands if they can rely on next of kin. Given the relevance of

the meso-level for various family outcomes, the incorporation of family ties in the study of the allocation of *economic resources* is another fruitful area of investigation.

### *Variation of experiences*

Mainstream literature on intra-household sharing is highly heteronormative: it centres on married heterosexual couples and assumes they are representative of the wider population. For instance, bargaining models are not easily applicable to different family forms or families in different stages of the life-cycle (Lundberg, Pollak, 2003). In addition, mainstream theories represent the vision of white middle-class families as the dominant status group whose perspectives construct the norms about how a family is supposed to function (Ridgeway, Kricheli-Katz, 2013). Gender is therefore embedded in the definition of «family» and is intrinsic in the domestic roles of «husband» and «wife» (Loscocco, Walzer, 2013).

The institution of marriage incorporates ideological beliefs about values that men and women attach to different dimensions of family life (Cherlin 2009), even though these are not necessarily shared by all men and women. Acting as a «wife» assumes some sort of dependence, the affinity towards care work as well as a major responsibility for it in the everyday life of a family. Yet, breadwinning arrangements are central to the life of a husband. Consequently, the intra-household division of economic resources may be closely linked to the systematic gender difference attached to the division of roles typical of heterosexual married couples (Burgoyne et al. 2008). However, if marriage and gender are socially constructed, intra-household sharing might operate differently across groups with, for example, different race, class and sexual orientation. The presence of children might further foster the traditional representation of marriage and idealized roles of men and women. We discuss these possibilities in the following paragraphs.

*Beyond heterosexual marriage.* The culture of heterosexual marriage, socio-legal frameworks regulating partnership formation, and the absence of legal rights in non-marital unions matter for any understanding of the behaviour of couples (Klawitter 2008; Hopkins et al. 2011). With the diffusion of same-sex unions, blended and reconstructed families, and living apart together



arrangements (Black et al. 2007; Burns et al. 2008), it becomes increasingly important to incorporate certain characteristics – such as sexual orientation– that were fully ignored in early research. Gay and lesbian couples, as well as other family forms that depart from heterosexual marriages (Black et al. 2007), including cohabiting (Burgoyne et al. 2008; Winkler 1997), remarried and blended families (Raihas 2011) are likely to display lower levels of specialization. Both partners are likely to work, challenging the dominant male-breadwinner model (Blossfeld, Drobnič, 2001) and to either attach a different meaning to the «liberating» role of money or display a higher sensitivity to market-based logics and the role of individual contributions by giving a higher value to bargaining power in intra-household relations (Burgoyne et al. 2007).

When there is no clear breadwinner logic to follow, couples are more prone to renegotiations of power (Black et al. 2007). For instance, individual bargaining predicts the well-being of each member in same-sex couples better than it does in different-sex couples, indicating that individual income serves as a stronger bargaining instrument (Klawitter 2008). Similarly, cohabitation is seen as a union with «a lower level of financial solidarity» because cohabiters are less likely than married couples to share their individual income (Hamplova et al. 2014, 995; Winkler 1997), even in societies where cohabitation is largely diffused (Kulic 2013). Additional characteristics, such as the presence of children or longer durations, may affect the transaction costs, creating similarities with heterosexual marriage (Treas 1993; Winkler 1997). Although an increasing number of studies investigate financial issues among same-sex couples and other less-studied family forms, this remains a largely unexplored area of research with significant potential that must be theoretically incorporated.

*Variation in socio-demographic characteristics.* Differences in terms of class, ethnicity and race that were largely ignored by classic theories are also likely to influence intra-household sharing (Vogler, Pahl, 1994; Kenney 2007). Klawitter and Fletschner (2011) highlighted that intra-household sharing will vary depending on income level, while Blumberg (1988) stated that the degree of control over surplus in households is more important than that over basic expenses. The

manner in which money is shared and managed varies according to race, too: joint systems and specialization particularly emerge in white middle-class families, while working-class and African-American women are more likely to work for a wage, and their partners are less likely to earn a «family wage» (Hunter 2001). Treas (1993) found that African-American women are less likely to pool their income so that the bargaining power of wages for this social group may matter more. This difference could reflect a high level of labour force participation among them, but may also result from belonging to a subculture that does not comply with the hegemonic beliefs of white families (Ridgeway, Kricheli-Katz, 2013). This and other issues related to variations in socio-economic characteristics are well worth future investigation.

*The role of children.* Parents are likely to show different dynamics in sharing compared to couples without children. Empirical tests of bargaining theories show how the presence of young children can actually influence the position of women in the household for the better: having children (Thibout 2015) and particularly male children (Li, Wu, 2011) provides a greater role to women in intra-household decision making. Distinct strategies are assumed for couples with children within the dynamic models that cherish a life course perspective. Couples without children tend to organize the bargaining around a single period without considering any element of the entire life-cycle, while families with young children incorporate immediate and medium-term future risks (Lich-Tyler 2003). In the transaction costs perspective, children are a common investment, which ameliorates the more «market like» dynamics within the household (Treas 1993). Although each theoretical perspective in intra-household sharing deals at least briefly with the role of children, empirical work on the topic is scarce, particularly for Western industrialized countries.

#### **4. Conclusions**

This article contributes to the literature by providing a critical review of the main strands of research in economics and sociology on the intra-household sharing of economic resources through the lens of gender. Acquiring a better understanding of the processes taking place between partners in the household is critical for the development of informed public policies tackling not only

household welfare, but also individual-level welfare. Indeed, the economic dependency of women persists around the world (England 2005; Fuwa et al. 2006; Ashraf 2009; Esping-Andersen 2009; Baxter, Hewitt, 2013; Bertrand et al. 2015; Dotti Sani 2018). If monetary resources are unequally shared, dependency may have important consequences for women's economic welfare, well-being and livelihood (Bourguignon et al. 1993; Brines 1994; Lundberg et al. 1996; Phipps, Burton, 1998; Bonke, Browning, 2009).

Our main goal in this article was to provide a general review of the research on intra-household sharing of financial resources and point out some voids in this literature that could be filled, as well as specific aspects that future studies could invest in to improve and strengthen. Compared to previous reviews (Donni, Chiappori, 2011; Bennett 2013; Himmelweit et al. 2013), the article contributes to a more comprehensive picture of the whole field by comparing and merging the theoretical stances derived from different schools of thought and scientific disciplines, by presenting evidence of empirical work that still needs to be addressed and incorporated by said theories and by proposing theoretical shifts to acknowledge the contextual changes in the social position of women.

By answering the key research questions highlighted in the introduction, this review identifies four principal messages. First, we note how the theoretical approaches towards intra-household sharing in the fields of economics and sociology shifted following the change of women's role in society in terms of education and employment levels between the early 1960s and the 1980s. Indeed, from an initial neglect of women's economic dependency in the household and its causes (Parsons, Bales, 1956; Becker 1981a), the field moved forward by acknowledging this dependence and studying the major determinants of intra-household sharing (Blood, Wolfe, 1960; Lundberg, Pollak, 1996). These determinants were found to go beyond individual and monetary factors, such as women's wages and other forms of income, to include other pivotal aspects such as the gender gap in work trajectories and careers, or physical and affective assets in the form of «erotic capital». Practical money management also was granted a role, as the collective investments, collective

goods and transaction costs approaches have shown through their introduction of the «couple perspective» to the study of intra-household sharing (Feller 1973; Williamson 1981; Pollak 1985; Treas 1993).

Second, we question whether the assumption of common preferences upheld by unitary theories holds under different historical and geographical circumstances. Recent theories have dismissed this assumption, in fact, and argued that women have their own preferences and use them to choose their preferred lifestyle arrangement (Hakim 2000; Gerson 2009). However, the actual freedom to choose a particular lifepath seems to rest on other assumptions, that is, the achievement of gender equality at the societal level and the absence of economic constraints, both of which requires more empirical and cross-national proof.

Third, we argue that looking at the individual position of women and men in families is not sufficient: macro-level factors such as norms, societal and economic conditions, welfare and meso-level structures such as kinship and immediate networks of friends and family ultimately set the scene for most intra-household processes.

Finally, we examine whether and to what extent differences between heterogeneous types of couples on the basis of race, class, ethnicity, sexual orientation, the legal character of the relationship and the presence of children have been taken in account. The «one size fits all» solution provided by most current theories misses the greater variety of intimate relationships, the changing contexts in which they are situated and the preferences of the couples who inhabit them.

Our critical assessment of the literature convinced us that further research on this topic will require improved and more complex survey instruments, both longitudinal and cross-national, and the incorporation of experimental designs in survey data and beyond, so to capture behaviours, attitudes, values, preferences and life-style arrangements, not just at the individual level but also at the couple level. Ultimately, our article calls for collaborations between sociologists and scientists from other fields as many of the current issues in theoretical and empirical research result from the failure of individual disciplines to broaden their horizons across fields.

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**Table 1.** Summary of the content, structure and contribution of the article.

		Part one	
		Theory	Main proponents
<b>Historical development</b>	Unitary models of family behavior		Becker, 1973, 1974, 1981a; Parsons & Bales, 1956; Samuelson, 1956.
	Bargaining theories and the relative resources approach		Blood & Wolfe, 1960; Brines, 1994; Hakim, 2000; Lundberg & Pollak, 1993; Manser & Brown, 1980; McElroy & Horney, 1981; Vogler & Pahl, 1994.
	Collective investments, collective goods and the transaction costs approach		Feller, 1973; Pollak, 1985; Treas, 1993; Williamson, 1981.
		Part two	
		Theory	Main proponents
<b>Avenues for future research</b>	Preference theory		Gerson, 1985, 2009; Hakim, 1991, 2000
	Macro contexts: Cultural, social, institutional and economic factors		Brines, 1994; Eirich, Robinson, 2017; Esping-Andersen 2009; Gornick, Meyers, 2003; Hochschild, Machung, 1989; Pollak, 1994; Sen, 1990; West, Zimmerman, 1987.
	Meso contexts: Kin, extended family and safety nets		Agarwal, 1997; Kazianga, Wahhaj, 2017; Ngenzebuke et al. 2018; Treas, 2011.
	Alternative applications across socio-demographic and family characteristics		Black et al., 2007; Blumberg, 1988; Burns et al., 2008; Hopkins et al., 2011; Kenney, 2007; Klawitter, 2008; Raihas, 2011; Treas, 1993; Winkler, 1997.