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Don't ask don't tell (that you're poor). Sexual orientation and social exclusion in Italy

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ABSTRACT

The role and extent of sexual orientation discrimination is the focus of a growing body of literature in economics and in other social sciences, across a wide range of social domains. This work aims at providing a holistic approach to the assessment of lesbian, gay and bisexual (LGB) people's life experience by developing a synthetic index of social inclusion. This is obtained by aggregating several variables pertaining to the following domains: monetary poverty, labour market attachment, housing conditions, subjective well-being, and education. We focus on the case of Italy due to the availability of a peculiar dataset that allows us to distinguish LGB people who are open about their sexuality and those who choose not to declare it. The empirical analysis highlights a lower level of inclusion of individuals in same-sex couples that cannot be explained by other observable characteristics. Thus, it may denote a lack of equal opportunities and a need for adequate inclusion policies. Being publicly open about one's sexuality is found as a crucial correlate of the welfare of LGB people, to an extent so far neglected by the literature.
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1. Introduction

Improved availability of statistical data on the gay and lesbian population is resulting in a growing production of studies on sexual orientation and gender identity discrimination. The bulk of the economic literature on these topics focuses on the labour market, investigating three main fields of potential discrimination: firms' human resources policies, work conditions and average earnings (for a recent review see Klawitter, 2012). However, works in the other social sciences have documented a substantial risk of discrimination of lesbian, gay and bisexual (LGB)[1] people in several other domains, such as family law, social policies, housing, health and healthcare, education and training. This work attempts at integrating as many of these fields as possible, with the aim to provide a holistic and synthetic approach to the assessment of LGB people's social life experience.

Discrimination, especially in the labour market, has become an established field of research for economists since at least Becker (1957). Discrimination may result in poverty, which for LGB people was investigated by Albelda et al. (2009) and Badgett, Durso, and Schneebaum (2013) for the case of the USA. However, theoretical and applied research originating from the seminal works by Amartya Sen (e.g. Sen, 1999) has shown the crucial need to adopt an integrated view of an individual's or a group's functionings in several domains, beyond earnings or the labour market, in order to adequately grasp their well-being (Chiappero-Martinetti and Moroni, 2007). Following the terminology adopted by the European Union institutions, in this work we develop a quantitative analysis of "multidimensional deprivation" but, as recommended by the Indicators' Sub-Group of the Social Protection Committee of the EU, we interpret it as an indication of individuals' "social exclusion", defined as the individuals' (in)ability to fully participate to societal life.

We use a fuzzy set definition of social inclusion, conceptualising it as a continuous rather than a dichotomic variable. We thus develop a synthetic index of inclusion/exclusion as well as a number of partial indexes, composed of several variables pertaining to the following domains: education, monetary poverty, labour market inclusion, housing conditions, and subjective well-being.

We focus on the case of Italy due to the availability of a peculiar dataset, the Bank of Italy's Survey on Household Income and

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[1] The acronym LGBT, including transgender and transsexual people, is more common in the political discourse, but due to data limitations our analysis does not concern gender identity discrimination and the social inclusion of "T" people.

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Wealth (SHIW) that allows us to distinguish LGB people who are open about their sexuality from those who choose not to declare it. Such distinction had been mostly ignored by the applied quantitative literature thus far, especially in the economic field, with few exceptions.[2]

Our analysis highlights a lower level of inclusion of individuals living in same-sex couples, which cannot be explained by other observable characteristics and may thus be presumably attributed to the potential impact of discrimination. Such evidence may constitute a case for equal opportunities policies aimed at eradicating discrimination and establishing a level playing field and a more equal society.

However, one of the main results of our analysis concerns the relevance of the above-mentioned internal bipartition of the LGB population between "out" and "closeted" LGB people. Individuals who are not open about their sexuality appear to suffer from a significantly lower level of social inclusion, especially in those domains that can be measured by objective variables. Such result implies two main consequences. In terms of policymaking, it highlights being publicly open about one's sexuality as a crucial correlate of the welfare of LGB people, and accordingly the need for tailored measures recognising the differences internal to the LGB population which is not a homogeneous group, beyond the more frequently considered differences between gay men and lesbians. Concerning applied research, it implies that several extant quantitative studies, in so far as they ignore such crucial variable, may have produced biased results.

The paper is structured as follows. In Section 2, we describe the dataset and the procedure adopted to identify out and closeted LGB individuals. Section 3 summarises the main literature on the social inclusion of LGB people and presents descriptive statistics of our sample, while developing precise hypotheses on the economic impact of sexual orientation discrimination. In Section 4, we describe the methodology used to develop a synthetic measure of social inclusion and in Section 5 we provide evidence of the impact of sexual orientation on it. Section 6 concludes.

2. Identification of the relevant population

We employ three subsequent waves of SHIW, respectively containing a representative sample of Italy's population in the years 2006, 2008 and 2010. The three waves of the survey were pooled in order to perform the empirical analysis on a reasonably sized sample of LGB people (who are a small fraction of total population). Due to the reduced size of the LGB sample, in what follows we adopt a repeated cross-section approach: indeed, since less than one-fourth of the survey is observed more than once, and since no LGB couple belongs to such longitudinal sub-sample, panel data techniques are not applicable to our dataset.[3] We interpret the corresponding results as loosely representing the 'average' situation during the period.

SHIW is a particularly fit database for our analysis, for a number of reasons. First, face-to-face interviews were conducted by professional interviewers who materially filled in the questionnaires.

Table 1.1
"Position in the family" possible options in the SHIW questionnaire.

1.	Family head (FH) (Note: in the 2010 wave: "Reference person")
2.	Spouse/partner of the FH (Note: in the 2010 wave the two options were disjointed, constituting respectively options n. 2 and 3; all subsequent options were thus rescaled by 1)
3.	Parent of the FH
4.	Parent of the spouse/partner of the FH
5.	Child of the FH and of his/her current spouse
6.	Child of the FH or of the spouse, from previous relationship
7.	Spouse/partner of the child of the FH or of the FH's spouse/partner
8.	Grandchild of the FH or of his/her spouse/partner
9.	Niece/nephew of the FH or of his/her spouse/partner
10.	Sibling of the FH
11.	Sibling of the FH's spouse/partner
12.	Spouse/partner of the sibling of the FH or of the FH's spouse/partner
13.	Other relative of the FH or of the FH's spouse/partner
14.	Other member not related to the FH (Note: *the obvious meaning in Italian is* "*not legally* or *biologically related*").

Source: Banca d'Italia, SHIW Survey Questionnaire.

They certified of the anonymity of the survey, conducted on behalf of a respected and credible institution, and at the same they attended at the correctness of the answers by providing to the respondents all the information they may ask, and by making sure that they understood correctly both the questions and the answer options. These features minimise the risk of data miscoding, which has been proven to potentially bias the results of studies of small populations such as LGB people (see below).

Second, as already mentioned, SHIW allows for the identification of both "closeted" and "out" LGB couples in the following way. The survey collects data on "families" rather than households. By this term any group of people is meant, who: (i) live together, (ii) have a moral-emotional relationship, and (iii) share their individual resources. Direct email and telephone communications with staff of the Bank of Italy's Sample Surveys Division allowed us to understand that, according to the instructions provided to the interviewers, the condition of "sharing of resources" is to be understood as wealth and/or income pooling, whereas the simple partitioning of dwelling-related bills (such as utilities or the rent) is not generally considered as sufficient.[4] The criterion is thus to be understood as stricter than in most other population surveys. Moreover, explicit use of the Italian word *famiglia* (family) certainly excludes, both in the interviewers' and the respondents' understanding, such conditions as for example roommates and flatmates, co-living students, or elderly people living with full-time care service providers.

Before each interview began, the interviewer defined the family member earning the highest yearly income as the "family head" (FH). All other family members were then identified in terms of their relationship with the FH: this piece of information was asked to the FH himself/herself. The relevant question asked for each family member their "position within the family",[5] with fourteen possible answer options (fifteen in the 2010 wave) as displayed in Table 1.1.

Employing a narrow definition, for all individuals of the same sex, same-sex couples may thus be identified in the survey by considering:

[2] For example, Plug and Berkhout (2008) collect information on the degree of openness on the workplace for the young individuals who completed college education in the Netherlands in the academic years 2003/04, 2004/05, and 2005/06.

[3] Within SHIW a randomly chosen fraction of the sample is involved in a longitudinal survey (i.e. they are interviewed in two consequent waves). We dropped such duplications in order to make a repeated cross-section analysis feasible without recurring to a longitudinal modelisation of the data (prevented by data limitations, as explained in the text). For all individuals interviewed more than once the older observation was removed. This explains the temporal asymmetry in the size of our dataset discussed below.

[4] Some financial sharing is an important element in more established lesbian and gay relationships despite the greater importance of dual earnings and financial co-indipendence compared to different-sex couples (Burns, Burgoyne, and Clarke, 2008).

[5] The questionnaire's English translation available online on the Bank of Italy's website incorrectly reports "Status in household".

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