



# **THE URBAN POVERTY DATUM LINE IN RHODESIA**

**A Study of the Minimum Consumption  
Needs of Families**

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ROGER C. RIDDELL**

**FACULTY OF SOCIAL STUDIES  
UNIVERSITY OF RHODESIA**

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Salisbury  
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# **C O N T E N T S**

**Preface**

**Introduction**

<b>I</b>	<b>The Concept of The Poverty Datum Line</b> .....	<b>1</b>
<b>II</b>	<b>The Construction of The Poverty Datum Line for Salisbury</b> .....	<b>16</b>
<b>III</b>	<b>The Poverty Datum Line for Bulawayo</b> .....	<b>60</b>
<b>IV</b>	<b>The Poverty Datum Line for Fort Victoria</b> .....	<b>88</b>
<b>V</b>	<b>Relections on The Poverty Datum Line Study</b> .....	<b>109</b>
<b>VI</b>	<b>The Urban Poverty Datum Line in Rhodesia: Summary Chapter</b>	<b>114</b>

# **A P P E N D I C E S**

<b>A</b>	<b>The Minimum Nutritionally Adequate Diet</b> .....	<b>120</b>
<b>B</b>	<b>Beer</b> .....	<b>128</b>
	<b>List of Tables</b> .....	<b>129</b>
	<b>Bibliography</b> .....	<b>136</b>

## P R E F A C E

**M. W. Murphree, Dean, Faculty of Social Studies, University of Rhodesia.**

It has now been thirty years since the first poverty datum line study using Rhodesian materials was conducted by Professor Batson of the University of Cape Town in 1944. Fourteen years later, a second such study was carried out by Bettison, who was based at the Rhodes-Livingstone Institute in Lusaka. A further study is thus overdue, and now that Rhodesia has its own university it is appropriate that such a study should be conducted under its auspices.

The research which is represented in this volume arises from initiatives taken by various organizations which either approached the University with a request that such a study be done or offered financial assistance for the implementation of the request. Among these organizations were the Salisbury Commercial Employers' Association, Associated Chambers of Commerce of Rhodesia, the Catholic Commission for Justice and Peace in Rhodesia, Messrs. Rhodesian Cables Ltd. and the African Trades Union Congress. This range of support, representing as it does a spectrum of Rhodesian interests including labour, management and voluntary organizations, has been most gratifying.

In responding to these initiatives the University delegated the task of organizing the study to the Faculty of Social Studies, and during the period of their research the authors were located in the Department of Economics within this Faculty. An Advisory Committee, under the chairmanship of the Dean of the Faculty, was formed to assist the researchers in the formulation of their task. In an attempt to maintain the broad spectrum of interests and perspectives mentioned above, a range of organizations was invited to participate by nominating members to the Committee. A number were in a position to respond positively, and the membership of the Committee was comprised as follows:

Professor M. W. Murphree, (Chairman), University of Rhodesia  
Councillor Dr. W. Alves, Local Government Association of Rhodesia  
Mr. G. M. Betts, Institute of Directors  
Mr. D. G. Clarke, Department of Economics, University of Rhodesia  
Mr. R. L. Cole, Department of Economics, University of Rhodesia  
Mr. P. Harris, Department of Economics, University of Rhodesia  
Mr. A. Hawkins, Department of Economics, University of Rhodesia  
Mr. A. J. Mhungu, African Trades Union Congress of Rhodesia  
Professor D. H. Reader, Department of Sociology, University of Rhodesia  
Father E. W. Rogers, Catholic Commission of Justice and Peace  
Mr. G. W. Tyler, Salisbury Commercial Employers' Association

Dr. A. K. Weinrich, Catholic Commission of Justice and Peace  
Mrs. C. Willis, Associated Chambers of Commerce of Rhodesia

During the course of its work the Committee met five times. It also sought the advice of two distinguished academics in the Republic of South Africa who have been associated with similar studies in their own country, Professor H. L. Watts of the University of Natal and Professor P. A. Nel of the University of South Africa. Both Professor Nel and Professor Watts were present at the third meeting of the Committee, held in Salisbury in January, and their constructive and informed comment proved most valuable.

To conduct the study two researchers were appointed, Miss V. Cubitt and Mr. R. Riddell. Miss Cubitt, the senior member of the research team, took up her appointment in August 1973. She received her primary and secondary schooling in Rhodesia and holds the Bachelor of Social Science degree in Sociology and Psychology from the University of Cape Town and a Sociology Honours degree from the same university. Mr. Riddell, who took up his appointment in December 1973 holds a B.Sc. (Econ) degree from the University of Rhodesia. In keeping with accepted academic practice, once appointed the researchers were accorded autonomy to determine the ultimate form and content of the research, and it is appropriate here to reiterate what the authors themselves state (*infra, Intro.*), that they are solely responsible for the content of this volume. The University has had the responsibility of ensuring that the research be conducted at a level of acceptable academic competence, and the Advisory Committee of ensuring that the different perspectives it represents be given due consideration by the researchers. On both counts we are satisfied that this has been the case.

In its advisory role the Committee was by no means unanimous regarding every issue which fell under its purview. Many of these issues are discussed by the authors in this volume, particularly in Chapter One. There are two other issues which, in our correspondence and discussions with interested parties, have been put frequently as points of criticism concerning poverty datum line studies in general. These are that, firstly, such studies tend to lack objectivity and, secondly, that they are liable to misinterpretation and misuse.

With regard to the first of these criticisms, it should be noted that when people level the charge of subjectivism they are usually implying one or both of two things: that the study is not empirically based, that it does not arise inductively from "hard" data, and secondly, that the interpretation of data is biased by certain qualitative judgements intruded by the researcher. As to the first of these implications this work must stand or fall on its own merits; we are of the opinion that this volume presents more solid empirical

data on consumption requirements in Rhodesian urban conditions than has ever been assembled before. As to the second, it is inevitable that, in the study of such an intricate and complex organism as human society, certain qualitative judgements must be made by the researcher to enable him to order and arrange his data. Particularly is this true with regard to the construction of categories and the placement of data within them. Even in such a relatively "objective" exercise such as the taking of a census is this true. Faced with such difficulties, it is the task of the social scientist to attempt to minimize to the greatest possible extent the intrusion of extraneous judgements of value, to state clearly the bases upon which the organization of his data depends and to ensure that all the relevant data to the analytical framework used are included. This we believe the authors have done, and for supporting opinions we wish to quote the two South African experts who advised us during the study. Writing of the draft report submitted by Miss Cubitt and Mr. Riddell, Professor Watts commented, "It seems to me a piece of work on which they should be congratulated, and I consider makes a useful contribution to the literature". Professor Nel wrote, "The report is most comprehensive . . . I have only the highest praise for your study and regard it as far better than most South African PDL studies. I was impressed by its scientific approach and objectivity."

With regard to the second criticism, that such studies are open to misinterpretation and misuse, it can be pointed out that most scientific studies are open to the same charge, but that this does not thereby invalidate them. Misinterpretation frequently arises from the fact that such studies are not digested carefully. For this reason we urge a careful reading of this document, particularly with regard to its objectives. We emphasize that it is a study of minimum consumption needs for defined units under defined circumstances, not a study of income requirements for individual wage earners. A study of income requirements is beyond the scope of this present volume and would require an examination of the income characteristics of the units studied. We consider that such a study is of critical importance for Rhodesia and propose to mount such an exercise when our resources permit. We also consider that a corresponding study of minimum consumption requirements under farm and rural conditions is required and intend to conduct such a study in the future. These are, however, enterprises beyond the scope of this present volume, and the reader is urged to interpret this analysis within the context of its own stated objectives.

Unlike misunderstanding, the misuse of such a study arises not from a careless or inaccurate interpretation of it, but from the motivations, the "vested interests", of those who manipulate it. This is, of course, beyond our control, but once again this is not a valid reason to suppress the data and analysis contained in this study, for the potential in the proper use of

such a study far exceeds the dangers of its possible abuse. Rhodesia is currently beset with a multitude of problems of different sorts, among them the problem of the provision of a standard of living for all its inhabitants adequate to form a basis for a stable society. Any planning for the provision of this condition must rest upon an understanding of the minimum consumption requirements of the population. This study makes a central and critically needed contribution to this kind of understanding, and is published with this objective in mind.

M. W. MURPHREE,  
Chairman, Advisory Committee,  
Poverty Datum Line Study,  
University of Rhodesia.  
July, 1974.

## INTRODUCTION

The purpose of this study has been to outline and to cost the *minimum consumption needs* of urban African families. Research was conducted in Salisbury and Bulawayo, these being the main urban work areas, and Fort Victoria which represents a small Rhodesian town with no one major industry.

After the preliminary research and discussion of the concept of the PDL, costing exercises were carried out in Salisbury in January and in Bulawayo and Fort Victoria in February this year.

Chapter I discusses in some detail the history of the PDL both in this country and elsewhere and explains the assumptions and implications of the concept for the rest of the report. In Chapter II the method of costing is explained and the Salisbury PDL is calculated. Chapters III and IV discuss the PDL for Bulawayo and Fort Victoria respectively. The chapter on the Salisbury PDL is considerably longer than the chapters on Bulawayo and Fort Victoria. This is because much of the methodology used for the Salisbury analysis applies to the studies carried out in the other two towns. Only where significant differences appear is a detailed discussion of method given. Chapter VI summarizes data from chapters II, III and IV, and chapter V makes some final reflections on the project.

As will become clear in the report, this is a need orientated study which attempts to calculate the minimum income required to satisfy the minimum consumption needs of various families. Because of this orientation we have not surveyed the actual living conditions of people. An investigation into actual income and expenditure patterns would be the subject of further research.

Although the present study deals only with Salisbury, Bulawayo and Fort Victoria, the framework can be applied not only to other urban centres but to the rural situation as well. In a pilot survey in February 1974, we investigated the possibility of extending the PDL to African families on a European owned farm. Adjustments were made to account for differences between the rural and the urban situation. Farm employees receive payment in both cash and kind. For the farm PDL we calculated the income required for different sized families to maintain basic physical health and social decency, having taken into account the payments made to them in kind, for example, free accommodation and free primary medical care from the farmer's wife. This pilot survey investigated *one* farm only, and the farmer found the results both informative and helpful. Thus the PDL method was usefully applied to a farm situation and while we cannot generalize findings from one farm to another — given the diversity of farms and farm employment practices — this pilot survey has shown the feasibility of extending the PDL to situations beyond those contained in the present report.

We wish to express our thanks for the great help which we have received from so many people and organisations in the course of the research.



As well as those who have participated in the Advisory Committee meetings we would like to thank particularly the following: African Administration Department, Municipality of Salisbury; Housing and Amenities Department, Bulawayo; the Municipality of Fort Victoria; the Physiology Department of the University of Rhodesia; Harare Hospital; The Central Statistical Office; the Ministry of Health; the Old Mutual Insurance Company; the Salisbury and Rhodesian Omnibus Companies and the City Engineer's Department, Salisbury.

In the costing exercise we received cooperation from the many store and shopkeepers throughout the country, and the information was ably collected by Steven Kuipa, Cosmas Wakatama, Stanislaus Munyaka and Florence Gwazemba. For the farm application we are very grateful for the cooperation both of the farmer and also of his employees.

A list of all those who helped in the preparation of this report can never be complete, and to all those whose names and organisations have not been mentioned go our grateful thanks. In particular we would like to thank all those in the University who have given us so much of their time and experience throughout the whole course of the research: many of their ideas are present in the report. Though we remain solely responsible for the views expressed in the report, the whole project has really been one of cooperation and assistance from a wide section of the Rhodesian community.

## CHAPTER I

# THE CONCEPT OF THE POVERTY DATUM LINE

### Introduction

The term Poverty Datum Line (PDL) has been found with growing frequency in recent years in both academic reports and in the popular press. Yet there appears to be some confusion about the exact meaning of the term. This confusion is caused partly because, historically, the PDL has been defined in different ways and because it has been used for different purposes. Confusion is further caused because of the various ways that the term *poverty* is understood. It has been argued, for example, that the word *poverty* should be abandoned altogether in a study such as this because it does not explain adequately what the study is intended to reveal.<sup>1</sup>

Because of these real problems we consider it necessary to explain in some detail the concept of the PDL to be used in this report. It is hoped that this chapter on the concept of the PDL and the principles on which it is constructed will provide the reader with the conceptual basis for what follows in subsequent chapters.

### Historical Perspectives

Public concern with poverty in Britain towards the end of the last century led to a study of the problem of the poor in London by Charles Booth.<sup>2</sup> This was followed a few years later by a similar study in York by Seebohm Rowntree who gave the first extensive assessment and documentation of the living conditions of the poor.<sup>3</sup> Rowntree published works on the poor throughout the first half of this century and much of the present research on poverty and the PDL has its origin in his pioneering work.

In his attempt to describe the conditions of the poor, Rowntree made an important distinction. While acknowledging that those people without sufficient money to purchase the bare necessities for life were in a state of dire poverty, he also observed that even if people had sufficient money to avoid this state of poverty they often failed to live above the poverty line in practice. This observation led him to distinguish between what he called

<sup>1</sup>P. A. Nel, M. Loubser and J. J. A. Steenekamp, *The Minimum Subsistence Level and The Minimum Humane Standard of Living of Non-Whites Living in the Main Urban Areas of the Republic of South Africa, May 1973*. Bureau of Market Research, University of South Africa, Research Report No. 33, Pretoria, 1973, p.1.

<sup>2</sup>C. Booth, *Life and Labour of the People*, Williams and Norgate, London, Volume I 1889, Volume II 1891.

<sup>3</sup>S. Rowntree, *Poverty: A Study of Town Life*, Nelson, London, 1901.

Primary Poverty and Secondary Poverty.<sup>4</sup> Those living in Primary Poverty lived in such a state because they did not have enough money to maintain physical efficiency. Those living in Secondary Poverty were those 'whose total earnings would be sufficient for the maintenance of merely physical efficiency were it not that some portion of it is absorbed by other expenditure either useful or wasteful.'<sup>5</sup> This situation of Secondary Poverty arises because people react not only to physical needs and desires, but living in community with other men, they often rank social necessities higher than or at least equal to physical necessities. This insight clearly shows the importance of the human aspects of poverty, with many people living below the poverty line although 'objectively' they need not do so.

Though there is little controversy that those living in Primary Poverty are poor, it is not always accepted that those living in Secondary Poverty are also poor. If people are seen to buy 'luxuries' such as sweets and ice-cream before providing for their basic physical needs, public opinion may not be very willing to consider such people as poor. It is interesting to note that the 'excessive' consumption of beer by the poor — an argument popularly used in Rhodesia to illustrate that people are not poor — is not something unique to our own times. Rowntree's studies were attacked some seventy years ago with the argument that people cannot be poor if they spend what little money they have on 'unnecessary' items such as beer.<sup>6</sup> Earlier Booth had pointed out that excessive drinking might be the result rather than the cause of poverty.<sup>7</sup>

In describing the conditions of the poor in the north of England in the 1930s, Orwell refers to the important point that the poor do not spend their money in a way that the rich consider logical. But this does not mean to say that they are not poor.

Would it not be better if they spent more money on wholesome things like oranges and wholemeal bread or if they even . . . saved on fuel and ate their carrots raw? Yes, it would, but the point is that no ordinary human being is ever going to do such a thing . . . When you are underfed, harassed, bored and miserable, you don't *want* to eat dull, wholesome food. You always want something a little bit 'tasty'.<sup>8</sup>

Although Booth, and more especially Rowntree, could be called the founding fathers of poverty studies, the concept of the poverty datum

<sup>4</sup>*ibid.*, p.142.

<sup>5</sup>S. Mencher, The Problem of Measuring Poverty, *British Journal of Sociology*, No. 18, 1967, p.5.

<sup>6</sup>This is discussed in P. Laslett, Social Change in England 1901-1951, *The Listener*, 28th December 1961, p. 1095-1098.

<sup>7</sup>G. Booth, Conditions and Occupations of the People of East London, *Journal of the Royal Statistical Society*, 1888, quoted by T. S. and M. B. Simey, *Charles Booth*, Oxford University Press, London, 1960, p.180.

<sup>8</sup>G. Orwell, *The Road to Wigan Pier*, Heinemann, London, 1965, p.96.

line was first introduced by Bowley into England at the beginning of this century.<sup>9</sup>

In the 1930s Batson brought the poverty datum line concept to South Africa, and in 1944 he applied it to Rhodesia.<sup>10</sup> Batson defined the PDL as an estimate of the income needed by any individual household if it is to attain a defined minimum level of health and decency.<sup>11</sup>

The PDL attempted to measure the level of poverty of a household and the minimum income needed to maintain the household above the poverty line. Those households living below the line clearly lived in poverty. Because of the social implications of the word *decency*, the level of poverty defined in these early PDL studies usually went beyond Rowtree's concept of a level that enables one to maintain bare physical efficiency. Nevertheless the defined level of health and decency was still very low. These studies were also well aware that households living above the line would not be likely to spend all their income on the basic necessities listed in the PDL. Thus they attempted to calculate what income would be necessary to ensure that a family would purchase all the necessary items and in the quantities specified. This is what Rowtree had referred to as the level of Secondary Poverty, but in the early Southern African studies it was called, perhaps more appropriately, the Effective Minimum Level (EML). In the last Rhodesian study, in 1958, Bettison accepted the need for a level of income higher than the PDL because

The PDL must be viewed as a measure far removed from what a given family in practice requires to sustain itself in a minimum level of health and decency.<sup>12</sup>

While in the Southern African studies the PDL has been the subject of careful calculation and costing, the EML has not been estimated with the same degree of accuracy. Batson estimated that a family requires an income of 150 per cent of its PDL level to ensure purchase of all PDL components.<sup>13</sup> Other studies have used Batson's figure but there has been widespread recognition that the figure he chose is only approximate.<sup>14</sup> Thus whereas the PDL can be calculated with reasonable precision the EML, though an important concept, cannot be estimated with such a fine degree of accuracy.

<sup>9</sup>A. L. Bowley, *The Measurement of Social Phenomena*, P. S. King and Son, London, 1915, p.177-188.

<sup>10</sup>E. Batson, *The Poverty Datum Line in Salisbury*, School of Social Science and Social Administration, University of Cape Town, 1945.

<sup>11</sup>*ibid.*, p.1.

<sup>12</sup>D. G. Bettison, The Poverty Datum Line in Salisbury, *Rhodes-Livingstone Journal*, Vol. 27, 1960, p.21.

<sup>13</sup>E. Batson, *op. cit.*, p.14-16.

<sup>14</sup>M. Hubbard, *African Poverty in Cape Town, 1960-1970*, South African Institute of Race Relations, 1970, Appendix F. Calculation of the Effective Minimum Level, p.16-18.

Up to this point the PDL studies can be seen as a clear development of the first studies on poverty conducted in Britain. But more recent PDL studies in South Africa have tended to complicate our understanding both of what the PDL is supposed to be measuring and what it is meant to establish. These studies will be mentioned here briefly because they have received publicity both in Rhodesia and internationally and so may be more familiar to most people than the earlier studies.

The first complication arises because the purpose of the PDL study has been understood in different ways. Whereas it has been commonly supposed that 'the PDL concept aims to objectify the assessment of poverty'<sup>15</sup> the widely publicized 1973 UNISA study argues that

the purpose of this study is not to assess poverty; rather it is to determine the minimum financial requirements of members of households if they are to maintain their health and conform with Western standards of decency.<sup>16</sup>

The second complication occurs because a number of studies have split up the PDL itself into a number of levels: the primary PDL and the secondary PDL.<sup>17</sup> This division into two levels is not consistent with the one Rowntree made concerning Primary and Secondary Poverty, for both the primary and the secondary PDLs are related to the basic necessities required by a household to maintain health and decency. Whereas the primary PDL includes most of the necessary items such as food and clothing, other necessary items such as rent, transport and taxes have been put into a secondary level. This distinction is made because of an accepted difference in these studies between measurements of poverty based on long term and short term concepts. Further, some studies which divide the PDL into primary and secondary levels discuss the EML while others exclude it.<sup>18</sup>

A final complication results from the 1973 UNISA study.<sup>19</sup> Here the term Poverty Datum Line is not used, but the concept under discussion is called the Minimum Subsistence Level (MSL). In spite of the change of name it is argued that the concepts are very similar.<sup>20</sup> Then instead of considering the EML, the UNISA study introduces a completely new concept: the Humane Standard of Living (HSL). This is described as 'an attempt at determining a modest low-level standard of living', and is calculated not as a

<sup>15</sup>The Editor, *The Poverty Datum Line in Central Africa*, *Rhodes-Livingstone Journal*, Vol. 30, 1961, p.41.

<sup>16</sup>P. A. Nel et al, *op. cit.*, p.1.

<sup>17</sup>These include the following: J. F. Potgeiter, *The Poverty Datum Line in the Major Urban Areas in the Republic*, Institute of Planning Research, University of Port Elizabeth, Research Report No. 12, 1973, and P. N. Pillay, *A Poverty Datum Line Among Africans in Durban*, Department of Economics, University of Natal, Occasional Paper No. 3, Durban 1973.

<sup>18</sup>Potgeiter does not attempt to calculate the EML, whereas Pillay does.

<sup>19</sup>P. A. Nel et al., *op.cit.*, p.1.

<sup>20</sup>*ibid.*

percentage of the PDL, or MSL, but by bringing in other important but not so essential components.<sup>21</sup>

Clearly, then, there is much in these recent studies which can and does lead to confusion: the terms used have been changed, the aims of some studies appear to be different and some studies split up the PDL into two levels while others do not. It is for these reasons that we wish to explain fully our own understanding of the PDL.

### **The concept of the PDL in this study**

The historical background of poverty and PDL studies has shown that at present there is little sign of a clear consensus either of what the PDL is attempting to measure or of what its purpose is. This section will outline the concept of the PDL to be used in the rest of this report, the rationale for acceptance of items considered necessary and various implications of the choices that have been made.

In this study, attention is focused on the *minimum necessary consumption needs* of a family. The Poverty Datum Line is defined as

**The income required to satisfy the minimum necessary consumption needs of a family of given size and composition within a defined environment in a condition of basic physical health and social decency.**

Our concern is with a basic subsistence level of living, a level of human existence with no allowance for luxuries. We concentrate on the family as the consumption-unit and assume that the income received should allow the whole family, and not just one individual in the family, to live at the defined level. We are calculating an urban PDL and so are concerned with the costs to a family living in urban Rhodesia.

The level of subsistence at which the PDL family lives is one that maintains the family in a condition of basic physical health and social decency. The family needs to be fed, to be clothed and housed in such a way that physical health is maintained. Here the emphasis is close to Rowntree's concept of Primary Poverty where needs which maintain bare physical efficiency are considered. But when one moves on to examine the implications of maintaining a family in a state of social decency, there is a shift to comparisons within the human community and to necessities which are determined by community norms — no less real to the actual family than the more 'objective' needs to maintain physical health. Though it may not be necessary for physical health to purchase particular items it may be necessary for social decency. In deciding whether an item is necessary for social decency we have

<sup>21</sup>*ibid.*

consulted various specialists such as social workers, medical doctors, nurses, dieticians, administrators, sociologists and leaders of the community as well as the poor people themselves. Throughout the study we have been at pains to assess needs on the minimum requirements for social decency so as to ensure that we cost only for minimum necessary consumption.

At this point a word needs to be said about the racial — non-racial position of the PDL study. However much one might like to conduct a non-racial study, this is not possible in a country such as Rhodesia because of the many institutional constraints present in the country. Under the Land Tenure Act different races in Rhodesia have to live in different localities within the urban area: the black population in special townships and the white in European areas. As a result schools, clinics, certain shops and most service facilities are racially segregated and the costs of each vary from area to area. One could calculate a PDL for different racial groups and then work out an 'average' PDL. But such an average would be of little practical use to any group in the country.

In urban Rhodesia the African population constitutes by far the largest proportion of the lowest income groups; as a result our PDL study is specifically an *African* urban PDL study. This does not mean that we have reduced certain basic needs as if Africans' basic needs are somehow lower than those of Europeans. But where facilities have been found to be racially separated then the African facilities have always been chosen. In this respect our PDL is an African PDL and cannot be applied to other racially defined communities, such as the Asian or Coloured groups.

Yet given the social framework of Rhodesia and the resulting constraints we have to recognise certain limitations imposed on the study. The PDL is defined as the income required to satisfy the consumption needs of a family in a condition of basic physical health and social decency. But little account can be taken of the quality of certain necessary items because they are provided without the family being able to exercise any choice. Thus, for example, the quality of housing and the number of rooms allotted to families may well be inadequate for particular families. But as there is no practical alternative but to accept what is provided we have had to accept these limitations. Therefore, in certain cases, the facilities which are provided may mean that a family lives in a condition that is socially indecent and a danger to basic physical health.

In this PDL study we have used the term *family* rather than *household*. Bettison used the terms family and household without making a clear distinction between the two.<sup>22</sup> The urban budget surveys use the term household but

<sup>22</sup>D. G. Bettison, *op.cit.*, p.20.

by this they do not mean family. Households in the urban budget surveys contain more than two adults, the 'extra' adults being either relatives or lodgers.<sup>23</sup> For the PDL study we are concerned with the family-unit, a man and wife and children, and the income required to maintain various family sizes in a state of physical health and social decency. Thus the term family is used throughout to avoid ambiguity.

Returning to the definition of the PDL, it will be noticed that there is no mention of a time-scale. Yet it is clearly important to know for what period of time the income of a family should be maintaining the family in a condition of basic physical health and social decency. It is evident that a family can live on different levels of income depending upon the time period one considers. During a morning a family could easily live at the defined standard of living without spending any money at all. Over a day little but water is needed and over a week the family may need only to purchase food and fuel for cooking. Yet in spite of not having spent money over these arbitrarily selected time periods consumption will occur. Clothes will wear out as will cooking utensils and household goods while the rent will eventually have to be paid at the end of the month. Where then does one draw the temporal line?

The time element is important because many PDL studies in the past have only considered it necessary to consider consumption in the *short-term* without defining this time period. Some studies have excluded items such as rent, transport, taxes and the replacement of household goods from necessary consumption while other studies have pushed 'less important' necessary items into a secondary PDL level.

We consider that an arbitrary drawing of a temporal line is misleading. We have considered whether an item is essential — and if so then it has been included — or whether it is inessential — in which case it has been excluded from the list of necessary items. Household goods such as plates, spoons and dishes will wear out and so will need replacing; hence money is needed for their replacement. To make an arbitrary decision on a particular time horizon and to consider only short-term necessary items is in fact to consider a *below-subsistence level of living*. If items must of necessity be purchased, no matter when they are bought, then money is needed to buy them. A division into short-term necessary expenditure and long-term necessary expenditure must therefore be rejected.

<sup>23</sup>In the urban budget surveys, a household is defined as a man and wife with or without children or one parent with one or more children including dependents and others who boarded with the family. Lodgers who did not eat with the family were excluded.

*Rhodesia. Report on Urban African Budget Survey in Salisbury, 1969.* Central Statistical Office, Salisbury, October 1970, p.1.



### **The components of our PDL**

Having defined the PDL for this study and discussed some implications of the definition, we now have to decide exactly what are the necessary consumption items so that their costs can be calculated and the PDL incomes constructed. In the next chapter the costs of the items will be calculated; here we give reasons for their inclusion.

The necessary items for a family to maintain itself in a condition of basic physical health and social decency have been divided into the nine groups as follows:

- i. Food.**
- ii. Clothing.**
- iii. Fuel and Lighting.**
- iv. Personal Care and Health.**
- v. Replacement of Household Goods.**
- vi. Transport.**
- vii. Accommodation.**
- viii. Education.**
- ix. Provision for Post-Employment Consumption.**

The inclusion of some of these items will strike most people as obvious but the inclusion of others may perhaps be less self-evident. The items will be explained in turn, showing why each has been included.

#### **i. Food.**

The basic necessity of food requires no explanation, for without food a person is not able to live for more than a few days. Food is needed for the maintenance of bare physical efficiency, and it must be provided at the level that meets minimum nutritional requirements.

#### **ii. Clothing.**

Clothes are needed both for the maintenance of physical health and social decency. The choice of which clothes to include is open to a certain degree of arbitrariness, but the inclusion of the clothing item has never been questioned.<sup>24</sup> Like previous studies, this PDL emphasises minimum requirements.

#### **iii. Fuel and Lighting.**

Little explanation is needed to justify the inclusion of these two items. Fuel is needed for cooking and lighting materials are necessary for illuminating the house at night time.

#### **iv. Personal Care and Health.**

Personal Care embraces all items which are needed to prevent illness

<sup>24</sup>D. G. Bettison, *op.cit.*, p. 12.

and disease and to maintain a minimum level of personal hygiene. Provision has also to be made for the cure of common illnesses which are likely to come to any family at any time. Thus to maintain health, allowance must be made for the supply of a minimum number of basic medicines as well as a minimum number of visits by the family members to the local clinic. Maternity fees have also been included as a necessary item of expenditure.

#### **v. Replacement of Household Goods.**

A family is unable to maintain its physical health and social decency without having money for the replacement of household goods when they wear out. These include items for cooking, eating, washing and sleeping.

#### **vi. Transport.**

Transport costs of travelling to and from work and to and from school are considered essential items of expenditure. In practice it was found that in the areas where we have costed, most pupils are able to walk to school so that the actual costs included only relate to the costs of travelling to and from work.

#### **vii. Accommodation.**

It is illegal to live in the African urban areas of Rhodesia unless one lives in approved housing. For most people this means rented accommodation, but in some areas monthly charges can be paid in the home ownership schemes. Whichever type of accommodation is available, charges have to be paid both for housing and also for other facilities such as water. We are concerned here with the minimum charges that are paid by the poorer urban Africans.

#### **viii. Education.**

Education was not included as a necessary item in the previous two Rhodesian PDL studies, but it has subsequently been accepted in various South African studies.<sup>25</sup> There are a number of reasons why we consider education as a necessary item of expenditure.

It is accepted in a civilised society that basic education should be provided for its citizens.<sup>26</sup> If the State is unable to provide this education free then families require enough money to provide it for their children, so that

<sup>25</sup>See M. Hubbard, *op.cit.*, p.39, and P. A. Nel et al, *op.cit.*, p.11.

<sup>26</sup>United Nations Declaration of Human Rights, Article No.26, *Yearbook of the United Nations, 1948-1949*, p. 536.

'they can take their place in the kind of society in which they are growing up.'<sup>27</sup>

It might be argued that education is not essential as a family is able to live in a condition of basic physical health and social decency when school fees are not being paid. But in practice the non-payment of school fees in the short-term can lead to greater expense for the family in the long-term if children are unable to support themselves when they have grown up. In urban Rhodesia today some formal education is necessary to obtain a job. From our discussion with employers it is apparent that more and more years of formal education have become a pre-requisite for obtaining an urban job and the ability to speak English and to perform various learnt tasks have assumed growing importance.<sup>28</sup> This is even true for those employed in private domestic service.

#### ix. Provision for Post-Employment Consumption.

Unless one is to assume that a family is to cease to exist within a few days after the breadwinner stops work, then some provision must be made for the post-employment period of life. The criterion used to decide what provision should be made for this period originates in the definition of the PDL. A family in retirement must have an income that will enable it (now assumed to have been reduced to a man and his wife) to live in a condition of basic physical health and social decency.

If no provision is made for post-employment living then it is implicitly assumed that the family would cut back on necessary consumption during the working life of the breadwinner so as to 'save' for the future. But as the income of the breadwinner is already on the PDL he is unable both to cut back on necessary expenditure and also to live at the minimum specified level. Thus to reject provision for post-employment consumption is to imply either that the family should not exist in the post-employment period or else that it should live below the PDL during the employment period.

Conceptually we are unable to accept either alternative, and thus conclude that provision for post-employment consumption is a necessary item of expenditure. Finally in law it is recognised that employers have a com-

<sup>27</sup>N. N. Franklin, *The Concept and Measurement of 'Minimum Living Standards'*, *International Labour Review*, No. 95, 1967, p.287.

<sup>28</sup>An indication of rising educational qualifications comes from the Salisbury urban budget survey for 1969. In 1963 21,4 per cent of heads of households received education to the level of standard 6 or above whereas in 1969 the figure had risen to 29,5 per cent. *Urban African Budget in Salisbury, op.cit.*, p.8.

mitment to employees on retirement and minimum payments do have to be paid.<sup>29</sup>

### Components excluded from the PDL

Discussing the necessary items of expenditure leads naturally to a consideration of what items have been left out. A glance at the United Nations Declaration of Rights shows that unemployment benefits and security in the event of sickness have been excluded from our list.

Everyone has the right to a standard of living adequate for the health and wellbeing of himself and his family, including food, clothing, housing and medical care and necessary social services, and the right to security in the event of unemployment, sickness, disability, widowhood, old age, or other lack of livelihood beyond his control.<sup>30</sup>

In regard to the items contained in his PDL list, Bowley (1942) had the following to say:

such a standard is perhaps more remarkable for what it omits than for what it includes. It does not allow a penny for amusement, for sport, for education, for saving, for hire purchase, for holidays, for odd busrides, for newspapers, stationery, tobacco, sweets, hobbies, gifts, pocket money, or comforts, luxuries of any kind. It does not allow a penny for replacement of blankets, furniture or crockery. It is not a 'human' standard of living. It thus admirably fulfills its purpose of stating the barest minimum upon which subsistence and health can theoretically be achieved.<sup>31</sup>

Although our PDL does include education and the replacement of household goods, it is clear that most of the items mentioned by Bowley have also been excluded here. What is more there are other items which are purchased by those living below the PDL not mentioned in the above list. These include: writing materials and stamps, Church contributions, trade union subscriptions, radios and batteries and any sort of saving for family crises. Most of these would be considered important by poor families.<sup>32</sup>

<sup>29</sup>An indication of the inadequacy of these gratuities as the sole means of support can be seen from the Commercial Undertaking of Salisbury Employment (Amendment) Regulations, 1973, No. 2. *Rhodesian Government Notice* No. 1015 of 1973. Here the maximum gratuity for 45 years of service with earnings at the termination of employment of over \$35,97 a month is \$800. This gives, approximately, a monthly pension of some \$6,70, which is some \$20 less than the minimum amount required for a Salisbury retired couple. (see chapter II). This is inadequate unless some other form of pension is also provided.

<sup>30</sup>United Nations Declaration of Human Rights, Article No. 25, *Yearbook of the United Nations*, 1948-1949, p.536. Although Southern Rhodesia was not a member of the United Nations, she was a colony of the United Kingdom who signed the Declaration of Rights.

<sup>31</sup>A. L. Bowley, *The Poverty Line in Cape Town*, Series of Reports and Studies of the Social Survey of Cape Town, No. SP 3, 1942.

<sup>32</sup>In the Salisbury African Budget Survey, the following items not included in the PDL were purchased by the lowest quintile group: ice-cream, minerals, beer, cigarettes, polishes and cleaners, stationery, radio licences, dry cleaning and laundry requirements. *Urban African Budget in Salisbury, op.cit.*, pp.17-20.

In considering the list of items which have been excluded, one is led to ask the question: on what basis have some of these items been excluded, especially when many are rated so high on an average individual's assessment of necessary expenditure? After all if certain items are considered necessary by those with very low incomes then surely they are needed to maintain social respectability and decency? One must admit that some of the items excluded are commonly considered necessary for a reasonable *human* existence. How many people reading this report would consider it adequate never to read a newspaper or listen to the radio? It is apparent that certain judgements made regarding PDL necessities would not be made when considering what one thinks as necessary for one's own family.

As certain judgements do have to be made regarding what items should be included and what items should be omitted, PDL research workers run the risks of either making the figures too conservative or too high. Tradition in PDL studies has been on the side of conservative estimates of needs rather than the reverse; this has meant that one can be confident that all those whose income falls below the respective PDL figures are in poverty. This position has been taken to ensure that the figures can be accepted without fear of overstating the position.<sup>33</sup>

This also brings to light the fact that the PDL is in many respects an inadequate concept because it is a static construct. As time passes so the idea of what is necessary will change and the list of necessary items and minimum quantities will change as well. The aim of the present study is to show what levels of income are needed to eliminate near-absolute poverty at the present time. This is the first priority but it is not the end of the road. For once this has been achieved relative concepts of poverty, so important for the unequal income distribution problem such as we have in Rhodesia, need to be seriously considered.

The fact that poor families in practice do not spend all their income in the first instance on the items we have listed as essential and in the quantities we have considered clearly shows that however logical and consistent our study attempts to be, it remains partial. No family is ever likely to purchase items in the exact way this report suggests. For the PDL to be valid in practice the following assumptions have to be made:

- i. It is possible to estimate in monetary terms the basic needs of a family.
- ii. Families of similar size and composition and in the same environ-

<sup>33</sup>In a recent article the traditional approach of PDL studies to err on the side of underestimating rather than overestimating the needs of the poor has been attacked. 'No doubt one could nit-pick about the accuracy of PDLs until the cows come home. Error is inevitable. The crucial point, however, is that when one is dealing with barest subsistence levels it is better for PDLs to err on the side of generosity than on the side of skimping.' *Financial Mail*, 5th April 1974.

- ment have exactly the same needs.
- iii. The money available to a family is spent in the most rational way and only on the PDL items.
  - iv. There are no economic obligations beyond the basic nuclear family.<sup>34</sup>

Clearly the assumptions are too austere and unrealistic to hold in practice. As was shown in the historical discussion above, families have always needed more than the minimum necessary income for them to spend their money on the necessary consumption items and in the right quantities. It was in the attempt to bring the PDL nearer to social reality that the EML was introduced. The EML attempts to measure that level of income at which a family includes among its purchases all the items in the PDL and in the quantities specified.<sup>35</sup> It is usually the EML which is the level of income recommended when considering the level at which minimum wages should be set.<sup>36</sup>

This study, while appreciating the value of the concept of the EML, does not attempt to calculate specific EML levels. As was discussed above, the EML calculations have remained imprecise. Our study is orientated to minimum necessary consumption needs as specified in the definition of the PDL and elaborated in the list of necessary items. While admitting that the PDL is not adequate for a truly decent human existence, as in practice income will not be spent solely on the specified items, our purpose is to consider what the basic needs are and to cost for these needs. To move away from an examination of basic needs is to move into the realm of speculation and inexactness. Our study ends when the basic needs have been costed.

Mention needs to be made of the attempt to calculate *the* PDL, for the various urban areas of Rhodesia. There is in fact no such thing as *the* PDL.<sup>37</sup> Returning again to our definition of the PDL, we have attempted to show what is the minimum necessary income required by a family to live in a condition of basic physical health and social decency. But as family size and composition change so also will the minimum income required. A family with two children will need less money than a family with six children to satisfy its minimum necessary consumption needs. The PDL figures will change as family size and composition change. Yet, while one cannot say that

<sup>34</sup>Regarding this assumption, Bettison comments: "This assumption has only limited applicability in Western society; it has much less in many African societies where the rights of sisters' children over uncles or those even of parents over sons, for example, are formalised and widely respected." D. G. Bettison, *op.cit.* p.20.

<sup>35</sup>M. Hubbard, *op.cit.*, p.47.

<sup>36</sup>The EML is recommended as a basis for minimum wage levels for South African firms with British interests in the Parliamentary Select Committee on South African Wages. see *The Guardian* Thursday 7th March 1974, p.14, and *Financial Mail*, *op.cit.*, p.1.

<sup>37</sup>See P. N. Pillay, *op.cit.*, p.29.

there is *one* PDL income which can be applied to a particular region, it is possible to indicate which PDL figure relates most closely to the average family size and composition. But this figure cannot be applied accurately to the minimum needs of all family sizes, because smaller families will need less income and larger families more income than this particular figure. It is just not possible to choose a single figure from the different PDL figures and apply it accurately to all families in a particular area.

One final area of controversy that arose during our research was related to the naming of the whole study. It was argued that the term Poverty Datum Line should not be used because it gave the wrong impression of what was being measured. In its place a term such as the Minimum Subsistence Level was recommended by certain groups of people. It became clear, however, that there were two quite distinct groups of people advocating a change of name for completely opposite reasons. One group maintained that the term 'poverty' is completely misleading as the PDL figures are very high and people can survive and are surviving on an income very much less than this. This group clearly believed that the people receiving an income related to their PDL level were well off compared to the truly 'poor'. The second group objected to the use of the term PDL fearing that employers might feel satisfied if employees were paid a wage related to their PDL income and would not be willing to raise minimum wages any higher. Yet this group believed that the 'PDL wage' would be totally inadequate for decent human living and a term such as Minimum Subsistence would more appropriately describe the very low levels of living that we are calculating. Thus, they believed that many of those receiving a wage higher than the PDL would still be living in poverty.

After considering the possibility of re-naming the study, we have decided to retain the traditional term Poverty Datum Line. The term PDL has a long history and people both in Rhodesia and abroad are aware of what the PDL studies have attempted to do (even if there is some confusion of details). On the other hand the term MSL is new, with no history in Rhodesia, and its use would be more likely to cause general confusion rather than clarity. As the two terms apparently describe the same concept, one could well be in the position — if the name was changed to the MSL — of explaining to people that one is really discussing the PDL but that the name has been changed! From the above discussion of the reasons for changing the name of the study, it is apparent that reasons for change cover widely differing views. To change the term would be more likely to increase these differences than decrease them. Lastly, the term 'poverty' appears to be no more subjective than the term 'subsistence' and there seems to be no good reason why subsistence is a better description of the concept to be measured than the term poverty. Thus we have decided to retain the traditional term.

In reading many of the PDL studies conducted both in Rhodesia and in South Africa over the past forty years, we have felt that too little attention has been given to discussing the concept of the PDL and its implications. While much has been made of the figures obtained, confusion has arisen because insufficient attention is often paid to what exactly is being measured. Yet it is essential to understand the basis on which the study stands so that the correct conclusions can be drawn and the implications of the study understood. For these reasons we consider this first chapter important for a full understanding of the subsequent chapters and discussion.





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