

**Socially perceived necessities in
South Africa: comparing the views of
sub-groups of the population**

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**Centre for the Analysis of South African Social Policy
University of Oxford**



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1 Introduction

This paper presents findings on people's views about what is necessary for an acceptable standard of living in present-day South Africa. Until recently, poverty has most commonly been conceptualised, defined and measured in South Africa in terms of whether people possess the basic means to survive, often using minimalist and money-metric measures (e.g. World Bank, 2000). In contrast, the approach taken here is based on a concept of relative poverty that focuses on the ability of people to achieve a socially determined acceptable standard of living to enable them to participate fully in society (Townsend, 1979; Pantazis *et al.*, 2006). Such an approach includes but also goes beyond the meeting of basic needs and resonates well with principles contained in key South African policy documents and the Constitution (Magasela, 2005).

The research is based on the 'socially perceived necessities' survey tradition that originated in Britain (e.g. Bradshaw *et al.*, 1998; Gordon and Pantazis, 1997; Gordon *et al.*, 2000; Mack and Lansley, 1985; Pantazis *et al.*, 2006). This approach has been applied subsequently in several other countries around the world though not, until this study, in a society that has such high levels of inequality as South Africa (Leibbrandt *et al.*, 2010).

This paper explores whether - in spite of the many differences that exist between different social, racial and economic groups in South Africa - a common view exists about what is required in order to be able to have an acceptable standard of living.

Although a 'socially perceived necessity' can be defined as an item that had been defined as essential by 50% or more of the population in a nationally representative survey, it could be argued that a socially perceived necessity should take into account more than just the simple majority view of the total population because it is possible that views about necessities might differ quite considerably between subgroups. When the socially perceived necessities approach was applied in the UK, there was an implicit assumption that all groups in society aspire to a similar lifestyle and so have broadly similar views as to what comprise necessities:

'The validity of this approach rests on the assumption that there are not wide variations in the definition of necessities amongst the different groups in society. Otherwise, the definition of an unacceptable standard of living just becomes the opinion of one group against another.' (Gordon and Pantazis, 1997: 72)

In 1985 Mack and Lansley found that such a consensus was empirically evident in the UK:

'The homogeneity of views shown by people both from very different personal circumstances and also holding very different political ideologies suggests that judgements are being made on the basis of a cohesive view of the kind of society we ought to live in. There is, it seems, a general cultural ethos about what is sufficient and proper.' (Mack & Lansley, 1985: 83)

So too, the authors of *Breadline Britain in the 1990s* observed that:

'There is a high degree of consensus, across all divisions in society, on the necessity of a range of common possessions and activities. Society as a whole

clearly does have a view on what is necessary to have a decent standard of living.’ (Gordon and Pantazis, 1997: 96).

Most recently, authors of the book about the *Poverty and Social Exclusion Survey* also observed that the degree of consensus between different groups was ‘surprisingly strong.’ (Pantazis, Gordon and Townsend, 2006: 118).

The extent of agreement between different subgroups becomes particularly important when measuring the lack of socially perceived necessities. If there is a general agreement about the necessities in life across the population, then if someone does not possess the item it is reasonable to regard it as a deprivation or an indicator of poverty, particularly if the item is defined as essential by the whole population. However, if different subgroups in the population define different items as essential, then the lack of an item could sometimes relate to poverty and sometimes relate to choice (preferences). It has therefore been argued by McKay (2004) that this approach may result in the measurement of preferences rather than poverty. In relation to the *Poverty and Social Exclusion Survey*, he makes the following point:

‘We argue that there is no such consensus (as often claimed) – instead, there is a great deal of variation in different people’s ideas of what is necessary [.and..] the levels of agreement (or consensus) are relatively weak.’ (McKay, 2004: 203)

McKay warns that, if differences do exist between subgroups, certain subgroups could be classified as deprived simply because their consumption choices are not those of the majority.¹

There is no easy way to decide where to draw the line between agreement and disagreement (unless one defines the former as unanimity). However, to inform the decision there is merit in considering the correlations between responses of different subgroups and exploring the extent of commonality between different subgroups’ responses. In this paper, comparisons are made by sex, age, population group, area (urban/rural), poverty status (using four different definitions), and for four different proxies for social class (highest educational level achieved, employment status, occupational status, and self-defined social status).²

2 Methodology

The analysis was undertaken using data from a socially perceived necessities module in the Human Sciences Research Council’s (HSRC) 2006 South African Social Attitudes Survey (SASAS). The module formed part of a project that was undertaken by the Centre for the Analysis of South African Social Policy at the University of Oxford. Initially, a series of focus groups were undertaken across South Africa, to explore what possessions, services and activities people regarded as essential that each and every person in South Africa should have, have access to, or be able to do, in order to have an acceptable standard of living (Noble *et al.*, 2004; Ratcliffe *et al.*, 2005). Findings from the focus groups have been reported in relation to education

¹ This issue was previously made by Halleröd (1994:4).

² See **Annex 1** for a summary of the sub-group variables used in this paper, including the proportions of the population that they capture.

(Barnes and Wright, 2007), children (Barnes *et al.*, 2007), housing (Magasela *et al.*, 2006), and health (Cluver *et al.*, 2007). Following on from these focus groups, a pilot module was included in the 2005 SASAS to obtain a nationally representative definition of necessities (Noble *et al.*, 2007; Wright *et al.*, 2010). Finally, a module was included in the 2006 SASAS which again included the definitional questions but additionally included measurement questions to ascertain who had and did not have the ‘socially perceived necessities’.

In order to construct a direct definition of relative poverty that falls within the parameters of an acceptable standard of living, the definition process can be broken down into five stages. First, a list of possible necessities for an acceptable standard of living is developed; second, the list of possible necessities is incorporated into a survey to explore which items are defined as necessary by a representative sample of the society; third, certain items are identified as ‘socially perceived necessities’ based on selected criteria; fourth, a poverty threshold is determined (e.g. how many socially perceived necessities need to be lacking in order to be classified as ‘poor’); and finally a decision is then made about whether (and if so, how) to cost out an income level below which people are likely to be deprived based on this definition.

This paper informs the third stage of the definitional process by considering the extent to which there is agreement between different groups in the population in terms of which items are essential.

The socially perceived necessities module was contained within Questionnaire 1 of SASAS 2006 (2,904 cases). The translation of the module³, training of the interviewers, the actual interviews, and the inputting, cleaning and weighting of the data were all undertaken by the HSRC, as part of the annual running of the survey (Pillay *et al.*, 2006; Roberts *et al.*, 2010). Questionnaire 2 of SASAS 2006 contained a set of common questions (but not the socially perceived necessities module) and some additional separate modules that were not included in Questionnaire 1. Analysis in this paper is undertaken using Questionnaire 1 which is nationally representative.⁴

In order for the analysis to be undertaken, an item-level dataset (rather than a person-level dataset) was created. This rectangular dataset contained a row for each of the 50 items that were asked about in the definitional (and measurement) modules in SASAS 2006 (see **Annex 2**). Alongside each item, the columns contain the responses of different subgroups in relation to that item, e.g. percentage of black African respondents defining the item as ‘essential’, percentage of black African respondents defining the item as ‘desirable but not essential’, and so on. All the figures in this new dataset were calculated using population weights.

Before comparing the views of sub-groups, **Table 1** shows the percentage of the total population that defined each of the 50 items as ‘essential for everyone to have in order to enjoy an acceptable standard of living in South Africa today’.⁵ This table serves as

³ The SASAS 2006 questionnaire was made available in seven languages (Afrikaans, English, isiXhosa, isiZulu, Setswana, Tshivenda and Xitsonga).

⁴ Questionnaire 2 is used for the purposes of imputing missing and implausible zero incomes in SASAS 2006, for which Questionnaires 1 and 2 were combined – this is explained below.

⁵ All responses are population weighted (to represent the total population in South Africa aged 16 and over in 2006) unless otherwise specified, and all percentages are rounded to the nearest whole number.

the benchmark against which the views of different sub-groups of the population can be compared.

Table 1 Percentage of people defining an item as essential (sorted in descending order)

Item	% of All saying essential
* Mains electricity in the house	92
* Someone to look after you if you are very ill	91
* A house that is strong enough to stand up to the weather e.g. rain, winds etc.	90
* Clothing sufficient to keep you warm and dry	89
* A place of worship (church/mosque/synagogue) in the local area	87
* A fridge	86
* Street lighting	85
* Ability to pay or contribute to funerals/funeral insurance/burial society	82
* Separate bedrooms for adults and children	82
* Having an adult from the household at home at all times when children under ten from the household are at home	81
* Having police on the streets in the local area	80
* Tarred roads close to the house	80
* Paid employment for people of working age	79
* For parents or other carers to be able to buy complete school uniform for children without hardship	79
* A flush toilet in the house	78
* People who are sick are able to afford all medicines prescribed by their doctor	77
* Someone to talk to if you are feeling upset or depressed	76
* A neighbourhood without rubbish/refuse/garbage in the streets	75
* A large supermarket in the local area	75
A radio	74
* Someone to transport you in a vehicle if you needed to travel in an emergency	74
* A fence or wall around the property	74
* Being able to visit friends and family in hospital or other institutions	73
* Somewhere for children to play safely outside of the house	72
* Regular savings for emergencies	71
* A neighbourhood without smoke or smog in the air	69
Television/ TV	69
Someone to lend you money in an emergency	66
A cell phone	63
* Meat or fish or vegetarian equivalent every day	62
A bath or shower in the house	62
Burglar bars in the house	62
Special meal at Christmas or equivalent festival	56
Some new (not second-hand or handed-down) clothes	55
A sofa/lounge suite	54
A garden	51
A car	49
A landline phone	48

Washing machine	44
A lock-up garage for vehicles	43
A small amount of money to spend on yourself not on your family each week	42
Having enough money to give presents on special occasions such as birthdays, weddings, funerals	41
For parents or other carers to be able to afford toys for children to play with	39
A burglar alarm system for the house	38
A holiday away from home for one week a year, not visiting relatives	37
A family take-away or bring-home meal once a month	34
An armed response service for the house	28
A DVD player	27
A computer in the home	26
Satellite Television/DSTV	19

Source: SASAS 2006

Notes: The 36 items that were defined as essential by more than half of the respondents are highlighted in bold. The 26 asterisked items are explained below in the conclusion section.

3 The ‘essentials’ by demographic characteristics

3.1 Sex

As seen in **Table 1**, 36 items were defined as essential by 50% or more of the population. These 36 items are referred to below as the ‘essential for all’ items. In Britain, some notable differences have been found between men and women in relation to necessities. For example the *Breadline Britain in the 1990s* study found that women were more likely to define nutritional and fresh food and activities for children as essential, whilst men were more likely to define new clothes, a best outfit, a holiday away from home, a dishwasher and video as essential (Payne and Pantazis, 1997).⁶

To what extent do responses differ by sex in South Africa? Fifty percent or more of female respondents defined all 36 of these items as essential, with one additional item: the landline phone (just over 50%). For men, one item drops out (garden, at 49%) and one item is added (car, at 51%).⁷ The responses by women and men for all 50 items that were asked about in the definitional module, in terms of the percent that define each item essential, correlates 0.9828 (using Spearman’s rho, $p < 0.01$).

The only two items with significant differences (where $p < 0.05$) were ‘someone to talk to if you are feeling upset or depressed’ (79% for women and 73% for men) and ‘someone to look after you if you are very ill’ (93% for women and 89% for men). The responses therefore differ very little by sex.

⁶ See Nyman (1996) for an equivalent Swedish study which, like the British study, found several significant differences by sex; and Pantazis *et al.* (2006) for analysis of the *Poverty and Social Exclusion Survey*’s socially perceived necessities by sex.

⁷ These three items straddle the 50% cut-off when we take into account the 95% confidence interval upper bound and lower bound for the total population.

3.2 Age

For the analysis by age, the views of people aged 65 and over were first examined to explore whether older people had particular concerns about certain items. The average age of people in this category was 71. Thirty-four of the 36 'essential for all' items were defined as essential by 50% or more of those aged 65 and over. The two items which dropped out were the cell phone (46% compared with 63% overall) and some new clothes (47% compared with 55% overall). Two additional items were defined as essential by more than 50% of those aged 65 and over: a landline phone (53% compared with 48% overall) and a washing machine (55% compared with 44% overall).

Older people are therefore more likely to define a landline phone as essential than a cell phone, whereas the population as a whole is more likely to define a cell phone as essential than a landline. There are a number of possible reasons for this. First, cell phones are cheaper than landlines, and people aged 65 and over are slightly wealthier than the average for all respondents (and therefore slightly more able to afford a landline).⁸ Second, the landline is a more traditional form of telecommunication and less technically complex and therefore possibly more appealing to older people. Third, people aged 65 and over are more likely to live in urban areas which have better landline provision than rural areas.⁹ The higher than average wealth and tendency to live in urban areas of this age group could also explain why a washing machine is defined as more essential than average, but in spite of these facts the possession of new clothes is accorded less importance.

Nevertheless, the responses for those aged 65 and over and those aged less than 65 (for all 50 items that were asked about in the definitional module, in terms of the percent that define each item essential) correlate 0.95 (using Spearman's rho, $p < 0.01$).

The views of people aged 16-24 (inclusive) were also analysed separately, to see whether younger people had different views about necessities. Thirty-five of the 36 'essential for all' items were defined as essential by a majority of those aged 16-24; the one item that dropped out is the sofa/lounge suite (48% for 16-24s compared with 54% overall). In addition the following two items were defined as essential by 50% or more of those aged 16-24: a car (54% compared with 49% overall) and a landline phone (51% compared with 48% overall).¹⁰ The responses for those aged 16-24 and those aged 25 and over (for all 50 items that were asked about in the definitional module, in terms of the percent that define each item essential) correlate 0.97 (using Spearman's rho, $p < 0.01$).

The table below shows the items which are significantly different ($p < 0.05$) in terms of 16-24 year olds defining them as essential compared with those aged 25 and over.

⁸ While 27% of all respondents have an average per capita household income of more than R847 per month, 32% of those aged 65 and over fall above this income threshold. People aged 65 and over are also more likely to be white, due to the highly racialised life expectancies in South Africa: whilst 11% of respondents overall are white, 27% of those aged 65 and over are white.

⁹ While 63% of all respondents live in urban areas, 71% of those aged 65 and over live in urban areas.

¹⁰ The differences between those aged 16-24 and 24 and over in terms of the percent defining a car and a landline phone are not significant.

Table 2 Percentage of people aged 16-24 and people aged 25 and over defining an item as essential – only significant items are listed

Item	16-24s % Saying Essential (n=565)	25 and overs % Saying Essential (n=2337)
For parents or other carers to be able to buy complete school uniform for children without hardship*	83	77
Someone to talk to if you are feeling upset or depressed*	72	78
A cell phone*	63	62
A small amount of money to spend on yourself not on your family each week	49	39
A sofa/lounge suite*	48	57
A holiday away from home for one week a year, not visiting relatives	43	34
A computer in the home	31	24
A DVD player	31	26
Satellite Television/DSTV	24	17

Source: SASAS 2006

Note: The items shown in this table are significant ($p < 0.05$). Items defined as essential by 50% or more of the total population are marked with an asterisk.

The higher percentages of young people defining computers, DVD players, satellite televisions, holidays away from home and a small amount of money to spend on oneself could be age-specific issues but are more likely to represent items that will continue to be regarded as more important as this cohort ages. The higher prioritisation given by those aged 16-24 to the ability to afford school uniforms for children could be explained in two ways. First, the memory of affordability of school uniforms may be more prominent in the minds of people in this age group, and second a higher proportion of this age group have children aged less than 16 in the household than those aged 25 and higher (65% and 58% respectively).

3.3 Population group

All 36 of the ‘essential for all’ items were defined as essential by 50% or more of black African respondents. This is unsurprising as the population of South Africa is predominantly black African and so black African preferences drive the overall population’s preferences.

Thirty-four items were defined as essential by 50% or more of coloured respondents. The ‘essential for all’ items that scored less than 50% for coloured respondents were a cell phone (37% compared with 63% overall), ‘some new (not second-hand or handed-down) clothes’ (43% compared with 55% overall), and a garden (42% compared with 51% overall). One item entered the majority threshold: the washing machine (51% compared with 44% overall). Some of these differences might be partly explained by the fact that whereas 63% of all respondents live in urban areas, 82% of the coloured respondents live in urban areas – and hence access to plumbing for a washing machine and landline phone availability will be higher than average.

Thirty-two items were defined as essential by 50% or more of Indian/Asian respondents. Thirty of the 36 'essential for all' items were defined as essential by 50% or more of the Indian/Asian population. The six items that dropped out were the radio (44% compared with 74% overall), television (47% compared with 69% overall), a cell phone (37% compared with 63% overall), some new clothes (42% compared with 55% overall), a sofa/lounge suite (42% compared with 54% overall), and a garden (38% compared with 51% overall). Two additional items entered the majority threshold for the Indian/Asian population: a car (57% compared with 49% overall) and a landline phone (60% compared with 48% overall). The low percentages for the radio, cell phone and television are quite striking and appear to be more 'morally based' than reflecting the realities of the lives of the Indian/Asian respondents.¹¹

Finally, 39 items were defined as essential by 50% or more of white respondents. All but two of the 36 'essential for all' items were essential for 50% or more of the white respondents. The items which dropped out were 'someone to lend you money in an emergency' (48% compared with 66% overall)¹² and a sofa/lounge suite (48% compared with 54% overall)¹³. Five additional items were defined as essential by 50% or more of white respondents: a car (74% compared with 49% overall), a washing machine (80% compared with 44% overall), a lock-up garage for vehicles (69% compared with 43% overall), 'a small amount of money to spend on yourself not on your family each week' (52% compared with 42% overall) and 'a holiday away from home for one week a year, not visiting relatives' (58% compared with 37% overall). All these items reflect an expectation of a higher standard of living – not just for themselves but for the population at large – including access to disposable income for holidays.

Table 3 below shows the percentage of people in each population group that define each of the 50 items as essential.

¹¹ Indian/Asian respondents mainly did possess a radio (96%), a cell phone (85%) and a television (98%).

¹² This probably reflects the fact that white people are wealthier on average and therefore are more likely to be able to draw from their own savings, less likely to have financial emergencies, and more likely to be able to access formal financial services through the banks.

¹³ Possibly reflecting the fact that a sofa/lounge suite is a status symbol that becomes less important if one is already wealthy relatively speaking.

Table 3 Percentage of people defining an item as essential by population group (sorted in descending order of % All defining the item as essential)

Item	All % Saying Essential (n=2904)	Black African % Saying Essential (n=1834)	Coloured % Saying Essential (n=480)	Indian/Asian % Saying Essential (n=279)	White % Saying Essential (n=310)
*Mains electricity in the house	92	90	96	97	99
Someone to look after you if you are very ill	91	92	89	94	87
*A house that is strong enough to stand up to the weather e.g. rain, winds etc.	90	88	97	99	99
*Clothing sufficient to keep you warm and dry	89	87	96	99	96
A place of worship (church/mosque/synagogue) in the local area	87	87	86	93	87
A fridge	86	85	84	96	93
*Street lighting	85	83	91	98	95
*Ability to pay or contribute to funerals/funeral insurance/burial society	82	84	75	80	75
*Separate bedrooms for adults and children	82	79	85	96	91
*Having an adult from the household at home at all times when children under ten from the household are at home	81	82	73	94	78
*Having police on the streets in the local area	80	78	83	85	90
*Tarred roads close to the house	80	78	78	96	88
*Paid employment for people of working age	79	77	82	92	92
*For parents or other carers to be able to buy complete school uniform for children without hardship	79	81	67	84	70
*A flush toilet in the house	78	72	94	99	99
People who are sick are able to afford all medicines prescribed by their doctor	77	76	76	86	84
*Someone to talk to if you are feeling upset or depressed	76	79	69	79	65
*A neighbourhood without rubbish/refuse/garbage in the streets	75	73	73	94	88
*A large supermarket in the local area	75	76	68	77	66
*A radio	74	77	60	44	73
Someone to transport you in a vehicle if you needed to travel in an emergency	74	73	72	86	80
A fence or wall around the property	74	73	71	77	82
Being able to visit friends and family in hospital or other institutions	73	73	67	75	74
Somewhere for children to play safely outside of the house	72	70	78	86	73
Regular savings for emergencies	71	73	61	71	69
*Television/ TV	69	74	53	47	52
*A neighbourhood without smoke or smog in the air	69	66	63	94	85
*Someone to lend you money in an emergency	66	70	55	64	48

*A cell phone	63	68	37	37	51
*Meat or fish or vegetarian equivalent every day	62	57	70	75	85
*A bath or shower in the house	62	52	86	97	99
*Burglar bars in the house	62	59	52	92	78
*Special meal at Christmas or equivalent festival	56	53	60	56	70
*Some new (not second-hand or handed-down) clothes	55	57	43	42	55
A sofa/lounge suite	54	55	60	42	48
*A garden	51	51	42	38	61
*A car	49	47	36	57	74
A landline phone	48	48	47	60	42
*Washing machine	44	38	51	38	80
*A lock-up garage for vehicles	43	41	32	42	69
A small amount of money to spend on yourself not on your family each week	42	40	43	31	52
*Having enough money to give presents on special occasions such as birthdays, weddings, funerals	41	45	27	20	33
For parents or other carers to be able to afford toys for children to play with	39	40	33	35	36
*A burglar alarm system for the house	38	37	29	50	43
*A holiday away from home for one week a year, not visiting relatives	37	34	36	27	58
*A family take-away or bring-home meal once a month	34	34	30	32	36
*An armed response service for the house	28	29	19	38	28
*A DVD player	27	30	15	14	21
*A computer in the home	26	28	14	10	30
*Satellite Television/DSTV	19	22	5	3	9

Source: SASAS 2006

Note: For items where the differences in response by population group are significant ($p < 0.05$) each item is assigned an asterisk and is shown in bold. The items are sorted in descending order of the extent to which they had been defined as essential overall.

The average number of items defined as essential (from the list of 50 items) did not vary greatly by population group, ranging from an average of 30 items defined as essential by coloured respondents, to an average of 34 items defined as essential by white respondents.

Table 4 below shows the correlations between the four population groups for all 50 items that were asked about in the definitional module, in terms of the percent that define each item as essential. Black African responses correlate highest with coloured responses (0.8556). Coloured and Indian/Asian responses correlate highest with each other (0.9296). White responses also correlate highest with coloured responses (0.9084). The highest correlation overall is therefore between coloured and Indian/Asian respondents. The lowest correlation is between black African and white respondents (0.7083).

Table 4 Spearman’s Rank Correlations of percentage of people defining an item as essential by population group (50 items)

	Black African	Coloured	Indian/Asian	White
Black African	1.0000			
Coloured	0.8556*	1.0000		
Indian/Asian	0.7913*	0.9296*	1.0000	
White	0.7083*	0.9084*	0.8981*	1.0000

Source: SASAS 2006

Note: All correlations with an asterisk are significant (p<0.01)

At an individual level, black African respondents defined 31 of the 50 items as essential on average. This compares with 30 items for coloured respondents, 33 items for Indian/Asian respondents, and 34 items for white respondents.¹⁴ Looking just at the 36 ‘essential for all’ items (shown in bold in **Table 1**), black African and coloured respondents define 26 as essential on average, compared with 28 items for the Indian/Asian and white respondents.¹⁵ The number of items defined as essential, and number of socially perceived necessities defined as essential, is therefore remarkably similar across population groups.

Nevertheless, unlike the comparisons by sex where views were very similar, there are some notable outliers when comparisons are made between population groups. The following six figures show scatterplots of the percentage of people in each population group defining each of the 50 items as essential. The shaded grey areas on the plots represent the 95% confidence intervals, based on the standard error of the forecast.

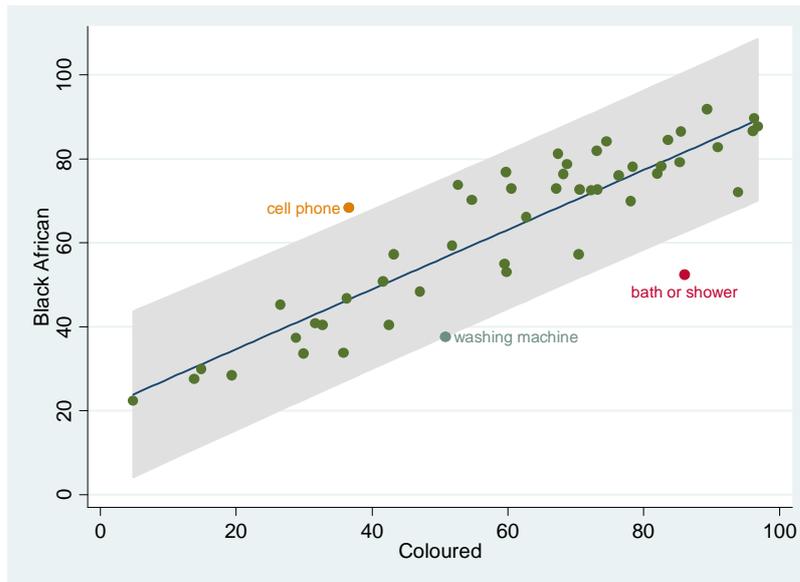
Figure 1 shows that a much higher percentage of coloured respondents define a bath or shower in the house as essential compared to black African respondents. Conversely, a much higher percentage of black African respondents define a cell phone as essential.¹⁶

¹⁴ These figures are the survey weighted means, rounded to the nearest whole number.

¹⁵ Again, these figures are the survey weighted means, rounded to the nearest whole number.

¹⁶ A much higher proportion of black African respondents live in rural areas than for the other population groups surveyed in SASAS 2006 and there is less landline availability in rural areas than urban areas.

Figure 1 Percentage of black African and coloured respondents defining each item as essential



Source: SASAS 2006

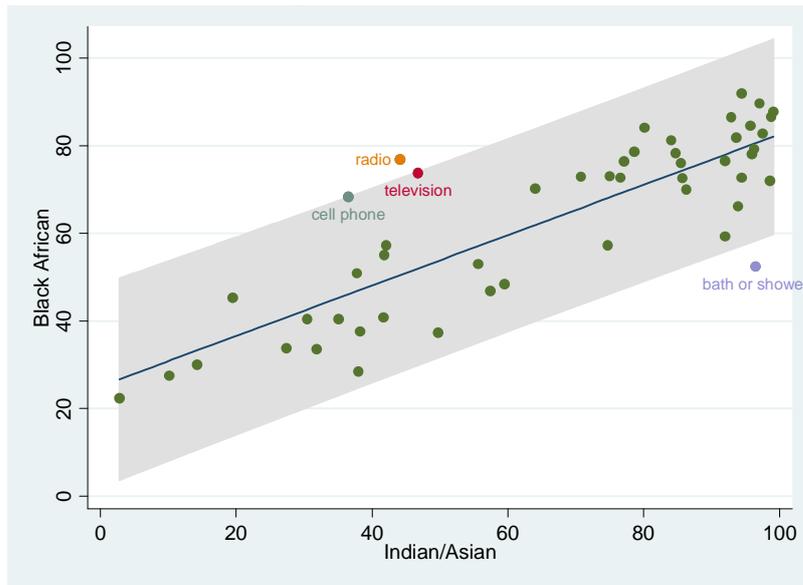
Note: 95% confidence interval (based on standard error of the forecast) shown in grey.

Spearman's Rank Correlation 0.86 ($p < 0.01$)

In **Figure 2** it can be seen that a higher percentage of Indian/Asian respondents defined a bath or shower in the house compared with black African respondents. Conversely, a higher percentage of black African respondents defined a radio, cell phone and television as essential.¹⁷ **Figure 3** compares black African responses with white responses and the two items that are the most prominent outliers are the bath/shower in the house and a washing machine, which are both defined as more essential on average by white respondents. **Figure 4** tells a different story: the most prominent outlier when coloured and Indian/Asian respondents are compared is for burglar bars which are defined as more essential on average by Indian/Asian respondents. When coloured and white responses are compared in **Figure 5**, the outliers are for a washing machine, car and lock-up garage for vehicles, all of which are defined as more essential by the white population.

¹⁷ This reflects the apparent 'moral judgment' made about radios, cell phones and televisions that the Indian/Asian respondents seem to have made (as discussed earlier).

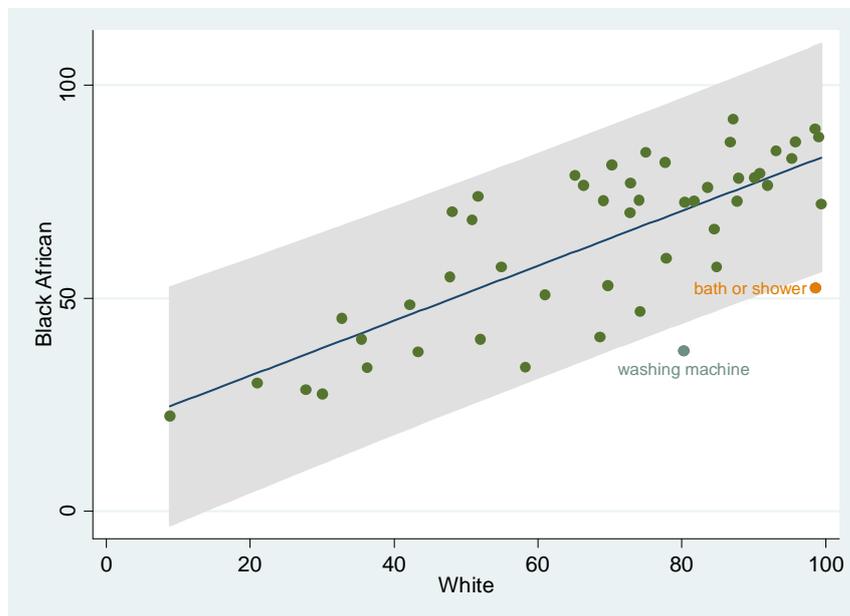
Figure 2 Percentage of black African and Indian/Asian respondents defining each item as essential



Source: SASAS 2006

Note: 95% confidence interval (based on standard error of the forecast) shown in grey.
Spearman's Rank Correlation 0.79 ($p < 0.01$)

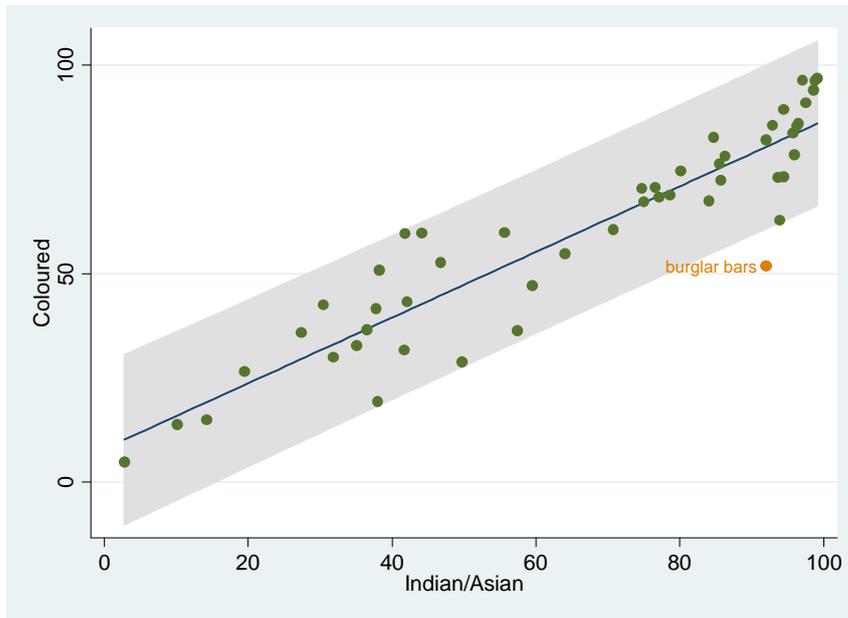
Figure 3 Percentage of black African and white respondents defining each item as essential



Source: SASAS 2006

Note: 95% confidence interval (based on standard error of the forecast) shown in grey.
Spearman's Rank Correlation 0.71 ($p < 0.01$)

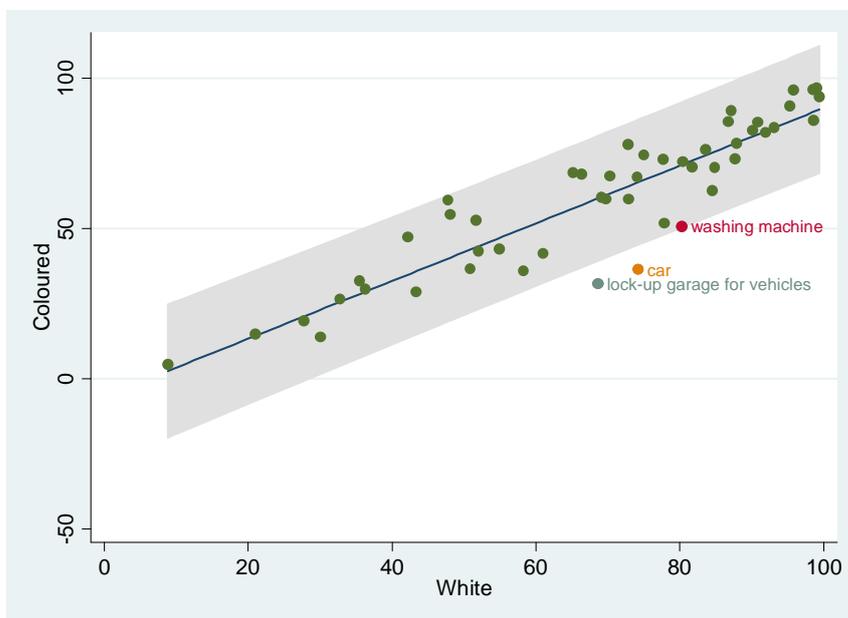
Figure 4 Percentage of coloured and Indian/Asian respondents defining each item as essential



Source: SASAS 2006

Note: 95% confidence interval (based on standard error of the forecast) shown in grey.
Spearman's Rank Correlation 0.93 ($p < 0.01$)

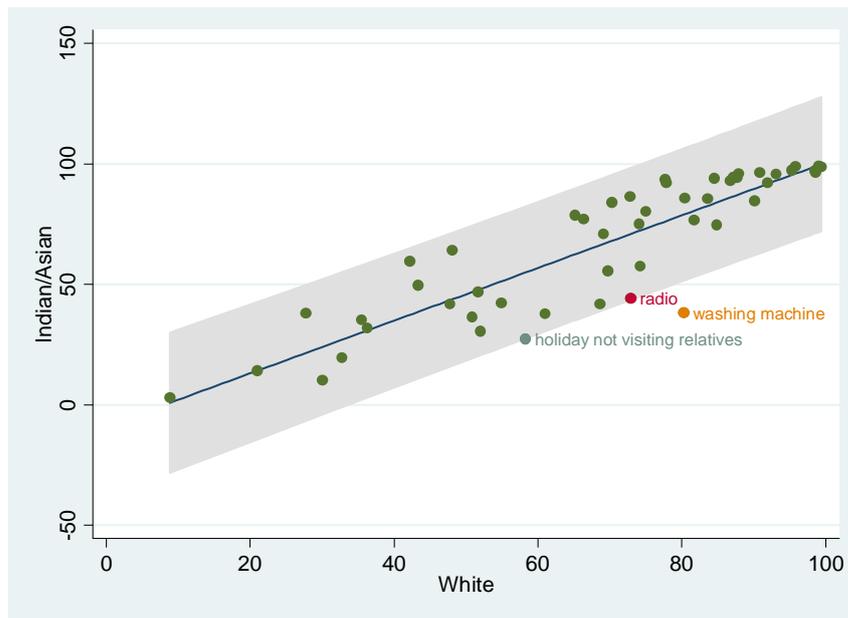
Figure 5 Percentage of coloured and white respondents defining each item as essential



Source: SASAS 2006

Note: 95% confidence interval (based on standard error of the forecast) shown in grey.
Spearman's Rank Correlation 0.91 ($p < 0.01$)

Figure 6 Percentage of Indian/Asian and white respondents defining each item as essential



Source: SASAS 2006

Note: 95% confidence interval (based on standard error of the forecast) shown in grey.

Spearman's Rank Correlation 0.90 ($p < 0.01$)

In order to explore the differences between population groups further, the list of essentials for each population group were analysed using Principal Components Analysis to see whether the emerging themes differ from those presented in Wright (2008) for the total population (i.e. a service provision/infrastructure-oriented grouping for the first component, a second component relating to material possessions, and a third component relating to social relations).

If one applies Principal Components Analysis to the 36 items that are defined as essential by 50% or more of the black African population, six components are generated that have an eigenvalue greater than 1 and the first component explains 48% of the variance. For the first component all the loadings are positive, with the highest loadings assigned to mains electricity in the house, street lighting, a weatherproof house, tarred roads close to the house and a bath or shower in the house. Just as for the total population, this could be thought of as a service provision/infrastructure-oriented grouping. The second factor (which explains 7% of the variance) relates to material possessions with the greatest loadings assigned to a television, cell phone and radio and this also tallies with the second factor for the overall population. However, the third factor (which explains 6% of the variance) differs from the overall population and seems to be focused on access to sufficient resources, with the greatest loadings being assigned to the ability to pay or contribute to funerals/funeral insurance/burial society, for parents or other carers to be able to buy complete school uniform for children without hardship, clothing sufficient to keep you warm and dry, paid employment for people of working age, and regular savings for emergencies. The fourth factor (which explains 5% of the variance) relates to social networks (paralleling the third component for the overall population), with greatest loadings assigned to someone to talk to if you are feeling upset or depressed,

someone to lend you money in an emergency, being able to visit friends and family in hospital or other institutions, special meal at Christmas or equivalent festival, and someone to transport you in a vehicle if you needed to travel in an emergency. Though the main emerging themes in Wright (2008) for all respondents are very similar to those found here, reflecting the fact that the majority of South Africans are black African, if one looks at the black African respondents' set of necessities separately, the underlying themes (service provision/infrastructure, material possessions, access to sufficient resources, and social networks) do seem to be being influenced by the fact that black African people have lower than average incomes compared to the other population groups, causing the 'access to sufficient resources' theme to be brought to the fore, reflecting their experience of higher levels of financial stress.

In contrast, if one applies PCA to the 39 items that are defined as essential by 50% or more of the white population, ten components are generated that have an eigenvalue greater than 1 and the first component explains 44% of the variance. For the first component all the loadings are positive and relate to housing, with the highest loadings assigned to a flush toilet in the house, a weatherproof house, mains electricity in the house, separate bedrooms for adults and children, and burglar bars in the house. The second factor (which explains 9% of the variance) has the greatest loadings for police on the streets in the local area, a neighbourhood without rubbish in the streets, a neighbourhood without smoke or smog in the air, street lighting, and a place of worship in the local area. For the third factor (which explains 6% of the variance) the greatest loadings are assigned to a television, a holiday away from home for one week a year not visiting relatives, and somewhere for children to play safely outside the house. These themes seem to refer to housing, the neighbourhood and what could loosely be described as 'recreation'. The role of social networks appears to be diminished, no doubt partly because there is less need to depend on such networks if one has greater financial security, relatively speaking.¹⁸

In spite of these distinctions, the correlations between population groups are remarkably high, as shown in **Table 4**. This reflects the fact that even though South Africa contains people with a wide range of standards of living there is a remarkable level of agreement about what an acceptable standard of living for the total population might comprise.

¹⁸ The emerging themes for the two other population groups are not so clear cut. For the coloured community, the main emerging themes are service provision/infrastructure/safety, service provision/'white goods' (fridge and washing machine), and the 'basics in life' (weatherproof house, bath/shower, clothing to keep warm and dry, flush toilet and paid employment). The two main emerging themes for the Indian/Asian community are the 'basics in life' (clothing to keep warm and dry, flush toilet, weatherproof house and street lighting) and the neighbourhood (police, neighbourhood without smog or rubbish, tarred roads and somewhere safe for children to play). The third and fourth factors do not appear to reveal coherent groupings around a particular theme.

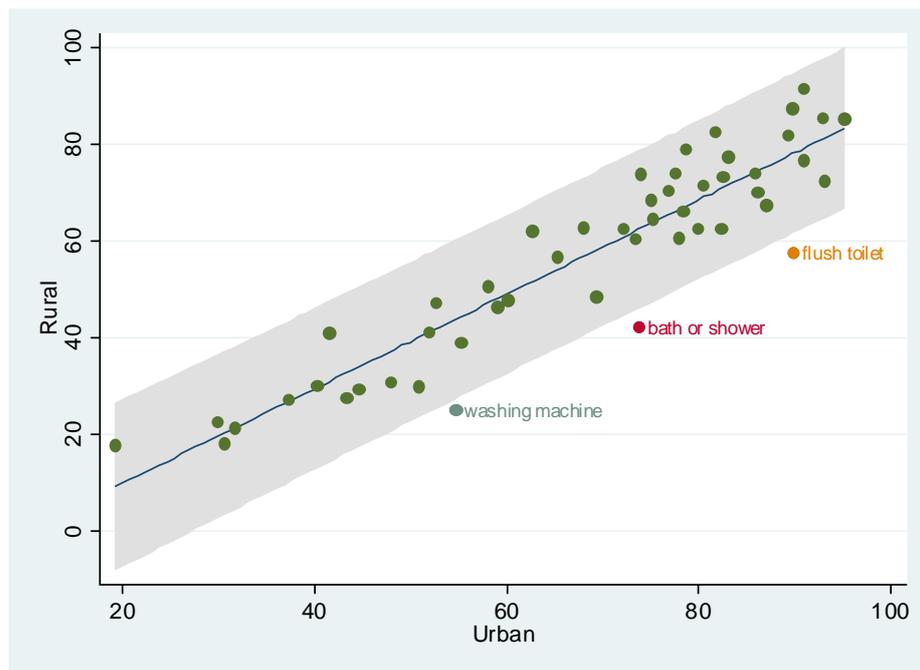
4 The 'essentials' by area

This section considers how the views of rural and urban people compare in relation to which items are defined as essential. Though South Africa's official classification of urban and rural areas is quite complex due to the high population density in some of the former homelands (Statistics South Africa, 2004), it is possible to achieve a close approximation using the categories within SASAS.

If one considers those who live in urban areas (areas classified in SASAS as 'urban formal' and 'urban informal'), 40 items were defined as essential by 50% or more of the urban population. This includes all 36 'essential for all' items, plus a car (55%), a washing machine (55%), a landline phone (52%) and a lock-up garage for vehicles (51%). In contrast, only 31 items were defined as essential by a majority of people living in rural areas (areas classified in the survey as 'rural formal' or 'tribal' i.e. mainly former homeland areas). These items were all defined as essential by a majority of the total population. The 'essential for all' items which dropped out from the list were burglar bars in the house (49%), special meal at Christmas or equivalent festival (48%), a garden (48%), a sofa/lounge suite (46%) and a bath or shower in the house (42%).

Only 4 of the 50 items were defined as more essential by rural respondents than by urban respondents (radio, ability to buy school uniform, someone to look after you if you are very ill, and ability to pay or contribute to funerals/funeral insurance/burial society) and the difference between urban and rural responses for each of these items was less than two percentage points. The urban and rural responses (for all 50 items in the definitional module and in terms of the percent defining each item as essential) correlate 0.90 (Spearman's rank correlation, $p < 0.01$). The figure below shows that the most prominent outliers relate to plumbing: a higher percentage of urban than rural respondents defined a flush toilet (90% for urban compared with 58% for rural respondents), bath/shower in the house (74% and 42% respectively), and a washing machine (55% and 25% respectively) as essential. The next three items relate to safety, with 51% of urban and 30% of rural respondents defining a lock-up garage for vehicles as essential, 69% and 49% defining burglar bars in the house as essential respectively, and 93% and 73% defining street lighting as essential respectively, reflecting the higher rates of crime that exist in urban areas.

Figure 7 Percentage of rural and urban respondents defining each item as essential



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman's Rank Correlation 0.90 ($p < 0.01$)

5 The 'essentials' by poverty status

This section considers people's responses to the definitional module by poverty status. Four different approaches are used, drawing from alternative poverty-related questions in SASAS 2006. The first is based on a question about self-defined poverty status (SDPS) which is a form of 'perceptual poverty line' (Gordon, 2006). The second is based on an equivalised household income (EHI) threshold, using the income threshold that Statistics South Africa and the National Treasury have proposed as an official poverty line (Statistics South Africa and the National Treasury, 2007). The third approach is a simplified use of a Minimum Income Question (MIQ), and the fourth approach is based on a question about hunger within the household which, as a form of food insecurity, is a proxy for extreme income poverty.

5.1 Self-defined poverty status

In SASAS 2006 Questionnaire 1, respondents were asked 'Would you say that you and your family are wealthy, very comfortable, reasonably comfortable, just getting along, poor, or very poor?' (Q150). This can be seen as a self-defined poverty status (SDPS) question, and responses were provided by 99.4% of all respondents. If one conflates 'wealthy/very comfortable/reasonably comfortable' into a single variable (i.e. 'not poor'), and 'poor/very poor' into a single variable (i.e. 'poor'), a comparison can be made between people who were 'not poor', 'just getting along' and 'poor'

using this definition. Of those who responded to this question, 33% were 'not poor', 38% were 'just getting along' and 29% were 'poor'.

A total of 42 items were defined as essential by 50% or more of those who were 'not poor' using the SDPS. These include the 36 'essential for all' items, plus a car (62%), a washing machine (60%), a lock-up garage for vehicles (58%), a landline phone (56%), a small amount of money to spend on yourself not on your family each week (51%) and a burglar alarm system for the house (50%).

For those who were 'just getting along', a total of 35 items were defined as essential. The one item from the 'essential for all' list of 36 items to drop out for this group was the garden (47% compared with 56% overall).

Finally, a total of 32 items were defined as essential by 50% or more of people who were 'poor' using the SDPS. The 'essential for all' items that dropped from the list were a special meal at Christmas or equivalent festival (48% compared with 56% overall), a bath or shower in the house (47% compared with 62% overall), a sofa/lounge suite (46% compared with 54% overall), and a garden (44% compared with 51% overall).

If one compares the responses of those who were 'not poor' and those who were 'just getting along', all but 5 of the 50 items were defined as more essential by those who were 'not poor' (the only exceptions being: clothing to keep you warm and dry, ability to contribute to funerals/funeral insurance/burial society, someone to talk to if you are upset or depressed, a television, and a cell phone, which were defined as more essential on average by those who were 'just getting along' than those who were 'not poor'). The greatest difference between these two groups was for a bath or shower in the house, where 79% of those who were 'not poor' on SDPS defined it as essential, compared with only 58% of people who were 'just getting along'.

Similarly, all but 4 of the 50 items were defined as more essential by those who were 'just getting along' compared with those who were 'poor' on the SDPS (the exceptions being ability to pay or contribute to funerals/funeral insurance/burial society, some new clothes, someone to look after you if you are very ill, and ability to buy school uniform without hardship, which were all defined as more essential on average by those who were 'poor' than those who were 'just getting along'). The greatest discrepancy was for the lock-up garage for vehicles, with 43% of those 'just getting along' defining it as essential, compared with only 25% of those who were 'poor'.

Finally, if one compares those who were 'not poor' with those who were 'poor' using the SDPS, all but two of the 50 items were defined as more essential on average by those who were 'not poor' (the two exceptions being clothing sufficient to keep you warm and dry, and ability to pay or contribute to funerals/funeral insurance/burial society). Looking at the items where a higher percentage of those who were 'not poor' define the item as essential than those who were 'poor', the seven items with more than a 20 percentage point difference were a lock-up garage for vehicles (58% for 'not poor' compared with 25% for 'poor'), a bath or shower in the house (79% and 47% respectively), a washing machine (60% and 28% respectively), a flush toilet in the house (91% and 62% respectively), a car (62% and 37% respectively), burglar bars in

the house (74% and just over 50% respectively), and a burglar alarm system for the house (50% and 29% respectively). The table below shows the correlations between these three groups. The responses of those who are 'poor' and those who are 'just getting along' correlate the highest (0.95). 'Not poor' and 'poor' correlate least well (0.91), though still highly.

Table 5 Spearman's Rank Correlations of percentage of people defining an item as essential by SDPS (50 items)

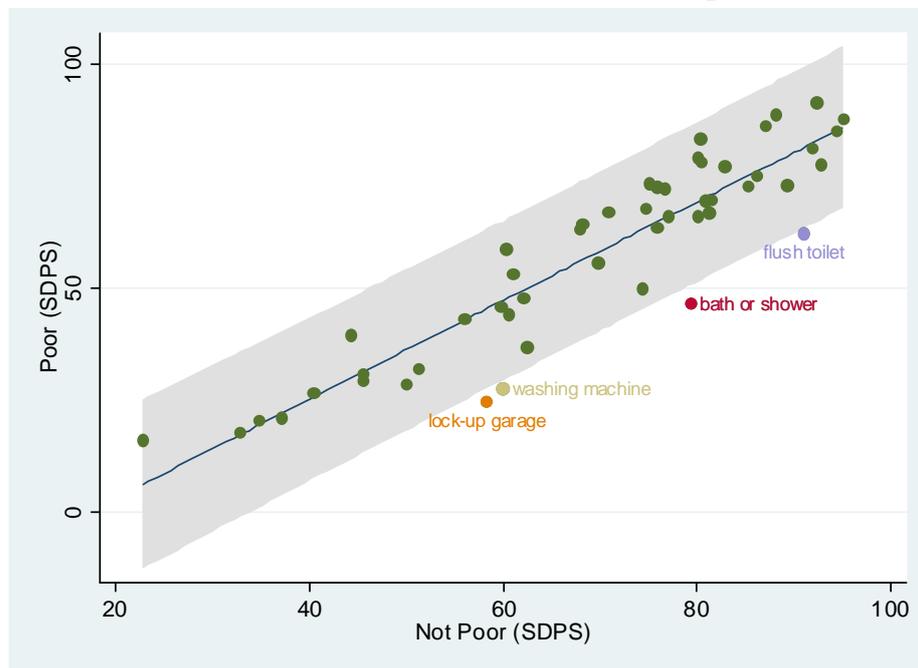
	Not Poor	Just Getting Along	Poor
Not Poor	1.0000		
Just Getting Along	0.9522*	1.0000	
Poor	0.9060*	0.9700*	1.0000

Source: SASAS 2006 Questionnaire 1

Note: * = p<0.01

The figure below shows the major outliers when comparing just those defined as 'poor' and those defined as 'not poor', using the SDPS. As can be seen, in general those who define themselves as 'not poor' are much more likely to define a flush toilet, bath/shower, washing machine¹⁹ and lock-up garage as essential than those who are poor on this measure.

Figure 8 Percentage of 'poor' and 'not poor' respondents defining each item as essential, based on the SDPS question



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman's Rank Correlation 0.91 (p<0.01)

¹⁹ Mack and Lansley refer to the washing machine as a labour-saving household good and discuss the way in which 'other aspects of life are planned and built on the very fact that these items are customary' (Mack and Lansley, 1985:56-7).

5.2 Equivalised household income

This section considers how people's responses vary by reported household income. Respondents to the SASAS 2006 Questionnaire 1 were asked 'Please give me the letter that best describes the total monthly household income of all the people in your household before tax and other deductions. Please include all sources of income i.e. salaries, pensions, income from investment etc.' (Q330). Before comparisons can be made between households with different incomes, four methodological issues had to be addressed: how to deal with missing incomes and implausible zero incomes in the survey; how to deal with the fact that the incomes in the survey are banded; how to produce equivalent incomes for different household structures; and which income threshold to use.

Missing and implausible zero incomes

In the combined version of SASAS 2006 (Questionnaire 1 plus Questionnaire 2, totalling 5,843 cases), 9.6% of respondents (563 cases) refused to provide their household income, and a further 13.5% were uncertain or did not know (789 cases). A further 0.3% of the cases had implausible incomes (16 cases, defined as households with zero incomes and yet with a respondent who reports that s/he is either full-time or part-time employed).²⁰ Unless the missing/implausible data are missing completely at random, profiles using the income variable will be biased. In order to make best use of the income data it was therefore necessary to impute values for these missing or implausible incomes.²¹

The technique selected for this task was Sequential Regression Multiple Imputation (SRMI).²² The software employed was developed by the Survey Methodology Program at the Institute for Social Research, University of Michigan, and was built using SAS Macro Language with a set of independent C and FORTRAN routines (Raghunathan *et al.*, 2002: 5-6). Raghunathan *et al.* (2001) describe this as a:

'general purpose multivariate imputation procedure that can handle a relatively complex data structure where explicit full multivariate models cannot be easily formulated but the imputed values for each individual are fully conditional on all the values observed for that individual' (Raghunathan *et al.*, 2001: 86).

As well as imputing values for missing incomes, SRMI imputes values for the explanatory variables which have missing data. The explanatory variables that were selected are listed in the table below.²³

²⁰ An assumption had to be made that the impact of *under-reporting* of income was negligible and did not need to be corrected for.

²¹ See Steen Larsen and Madsen (2000) for a summary of the range of different imputation techniques available.

²² Examples of the application of this method to South African data include Ardington *et al.* (2005) and Barnes *et al.* (2006).

²³ A further two variables (toilet facility and access to piped water) were initially used but were dropped because of collinearity.

Table 6 Variables which were used in the SRMI process in SASAS 2006

Variable	SASAS 2006 variable	% of cases requiring imputation
Total monthly h/h income of all the people in h/h before tax and other deductions.	q330q310	24.7
Domestic(s) working in h/h	q324q305	1.1
Connection to the mains electricity supply	q301q282	1.0
Main material used for the roof of the dwelling	q290q271	0.9
Type of main dwelling that the h/h occupies	q289q270	0.8
Fridge/freezer combination in working order	q306q287	0.8
M-Net and or DStv in working order	q319q300	0.8
Dishwasher in working order	q320q301	0.8
Home security service in working order	q317q298	0.8
Self-defined poverty status (SDPS) ²⁴	q150q313	0.8
Number of persons in this h/h	pershh	0
Environmental milieu	geo_type	0
Province	prov	0
Race of respondent	q271q241	0
Also needed:		
Record number	recnum	-
Current employment status	q283q254	-

Source: SASAS 2006 Questionnaires 1 and 2

The explanatory variables were common to both versions of SASAS 2006 and were selected because they were judged to be useful for predicting income status. SRMI applies different regression models to suit the type of variable: a normal linear regression model if the variable is continuous, a logistic regression model if the variable is binary, a polytomous or generalized logit regression model for categorical variables, and a Poisson loglinear model if the variable is a count variable (Raghunathan *et al.*, 2001: 87).²⁵

Each imputation is undertaken iteratively:

‘The sequence of imputing missing values can be continued in a cyclical manner, each time overwriting previously drawn values, building interdependence among imputed values and exploiting the correlational structure among covariates. To generate multiple imputations, the same procedure can be applied with different random starting seeds or taking every P^{th} imputed set of values in the cycles.’ (Raghunathan *et al.*, 2001: 86).

In practice it is necessary to undertake two or more iterations and as the authors recommend that ten cycles are usually sufficient (Raghunathan *et al.*, 2002: 16), this was set as the number of iterations for each imputation. A total of ten imputations were performed.

²⁴ This is SDPS question i.e. ‘Would you say that you and your family are... wealthy, very comfortable, reasonably comfortable, just getting along, poor, very poor?’.

²⁵ In practice all but one of the explanatory variables were given categorical status and so the IVEware software applied a polytomous or generalized logit regression model. The variable ‘number of persons in this household’ was defined as a count variable.

Raghunathan *et al.* (2001) assume that the data set arises from a simple random sample design, but this is of course not the case for SASAS 2006 which has to be weighted to become nationally representative. However, the SRMI designers have not yet constructed a package that can take into account the survey design. The authors advise that:

‘even if the imputation process ignores the complex design features, the analysis of completed data should be design based. Though this does not provide valid design-based inferences, it maintains the robustness underlying the design-based analysis to a certain degree’ (Raghunathan *et al.*, 2001: 93).

This was therefore the approach taken for the analysis of the income variable in SASAS 2006. The IMPUTE module in SRMI generates a series of imputed values for the missing/improbable zero incomes which then have to be combined in some way. The recommended procedure is to undertake the analysis using each of the ten imputations and then to average the final results, rather than averaging the imputed values at the outset (Little and Rubin, 2000). Before doing so, though, it was necessary to address the issue of how to convert the income bands into estimated incomes.

Banded incomes

In order to undertake the analysis ten times it was first necessary to convert the income bands to specific incomes and to select a method for producing equivalent incomes for different household structures. The SASAS 2006 income question has 14 bands, shown in the table below.

Table 7 Monthly household income bands in SASAS 2006

Band	Band Range	Midpoint
1	No income	0
2	R1-R500	250.5
3	R501-R750	625.5
4	R751-R1000	875.5
5	R1001-R1500	1,250.5
6	R1501-R2000	1,750.5
7	R2001-R3000	2,500.5
8	R3001-R5000	4,000.5
9	R5001-R7500	6,250.5
10	R7501-R10000	8,750.5
11	R10001-R15000	12,500.5
12	R15001-R20000	17,500.5
13	R20001-R30000	25,000.5
14	R30000+	52,156 (see below)

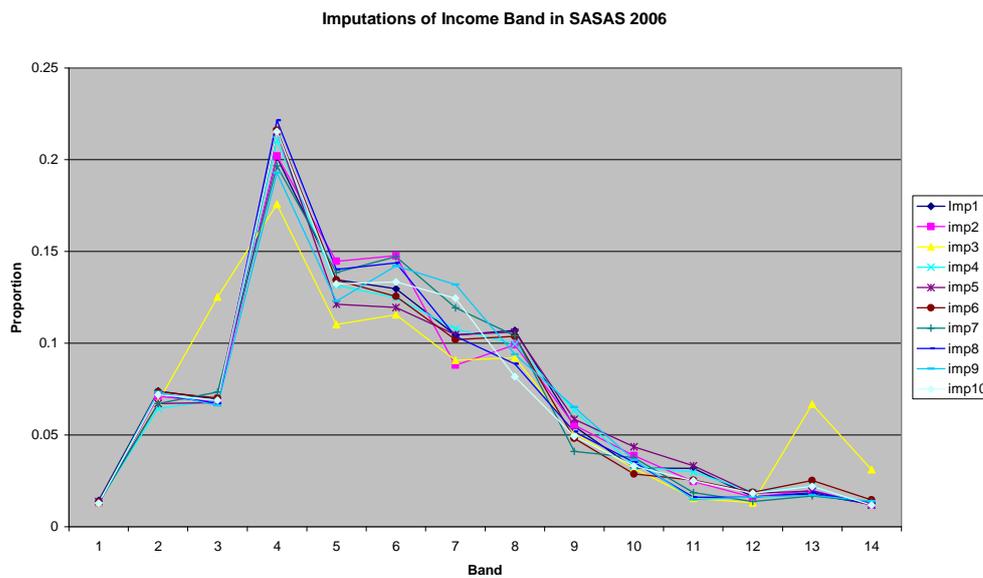
Amounts were assigned to the bands by selecting the midpoint of each band for bands 2-13, as shown in the table above. For band 14, a derived midpoint was calculated using the IES 2000. Households with incomes greater than R30,000²⁶ per month were selected and the unweighted mean (R57,822) and unweighted median (R38,350) household incomes were calculated. The reason for the mean being so much higher

²⁶ This is the range of the upper band of the income variable in SASAS 2006.

than the median was mainly due to a single case with a household income of R807,071 (the second highest household income was R426,219), and for this reason the median was selected.²⁷ The median amount was then inflated to August 2006 figures (the time when SASAS 2006 was in the field) using the Consumer Price Index (Statistics South Africa, 2007c) – reaching a figure of R52,156.

Having undertaken the SRMI and merged the ten imputations back into SASAS 2006 Questionnaire 1, it was possible to compare the ten imputation results. The figure below shows the proportion of respondents that were assigned to each of the 14 bands.²⁸

Figure 9 Imputations of income band in SASAS 2006 Questionnaire 1



Source: SASAS 2006 Questionnaire 1

The third imputation is clearly an outlier and has, for example, a much higher proportion of respondents assigned to bands 3, 13 and 14. However the other bands fit quite tightly. Having assigned midpoints to each of the bands (and R52,156 to band 14), the mean household incomes for the ten imputations were as follows (see **Table 8** below) – again the third imputation stands out.

²⁷ The median is less affected by the small number of very high incomes at the top of the distribution. For example, if the top 5 cases were deleted from the IES 2000 the unweighted mean was R47,875 and the unweighted median was R37,813.

²⁸ All cases in SASAS 2006 Questionnaire 1.

Table 8 Mean household incomes for the ten imputations of the income bands

Imputation	Mean income (Rand)
1	3715.69
2	3678.62
3	5488.65
4	3835.43
5	3871.14
6	3903.28
7	3553.20
8	3525.54
9	3695.28
10	3673.54

Source: SASAS 2006 Questionnaire 1

Equivalent incomes for different household structures

In order to equivalise the monthly household incomes a simple per capita calculation was undertaken as it has been demonstrated that in the South African context the choice of equivalence scale makes little difference to the identification of poor households (see Woolard and Leibbrandt (2006) for an overview of approaches to adjusting for household size and structure in the South African context).

Income threshold

The initial choice that had to be made when selecting an income threshold was whether to use an absolute minimum income threshold or a relative threshold which takes into account the whole income distribution (e.g. 40% of mean household income). Options for the minimum income threshold included \$1 or \$2 a day thresholds, the range of historical thresholds used in South Africa such as the Household Subsistence Level, and the two new ‘cost of basic needs’ thresholds which have been proposed by Statistics South Africa (Statistics South Africa, 2007a). If one had chosen to select a relative threshold, a secondary decision would have been whether to use an internally or externally derived threshold, i.e. whether to calculate a percentage of the mean household income from SASAS 2006 or from a dedicated income and expenditure survey, i.e. a suitably inflated figure from the IES 2000.

The selection of any of these thresholds is arbitrary but for the purposes of the analysis in this paper the higher of the two income thresholds that had been put forward by Statistics South Africa was selected (i.e. R593 per capita per month in 2000 prices) (Statistics South Africa, 2007a) as this takes into account (albeit in a very minimal way) the cost of basic needs in addition to just the cost of meeting one’s basic food requirements. This threshold was calculated as the amount required to purchase food that would supply the necessary energy requirements for one person for a month (i.e. 2661 kilocalories per person, as recommended by the South African Medical Research Council) – this came to R211 in 2000 prices and is referred to as the ‘food poverty line’ (Statistics South Africa, 2007a: 10). On top of this amount,

Statistics South Africa calculated the mean per capita consumption costs of households that spend R211 per capita per month on food (amounting to a total of R382 per capita per month for non-food items). These two amounts add up to R593 in 2000 prices (Woolard and Leibbrandt, 2006:21-22). This threshold (based on 2000 prices) has been put forward by Statistics South Africa as their proposed ‘upper bound’ for a ‘cost-of-basic-needs poverty line’ (Statistics South Africa, 2007a: 10) and has been referred to as a ‘traditional poverty line’ (Woolard and Leibbrandt, 2006: 22).²⁹ Adjusting the amount to August 2006 (the time when SASAS 2006 was in the field), this totals R847.4 per capita per month (Stats SA, 2007b:4).³⁰

Having calculated the percentage of people falling above and below the R847.4 per capita per month threshold, the ten imputations resulted in the following percentages of respondents falling below the selected threshold.

Table 9 Percentage of respondents that fall beneath the R847.4 per capita per month threshold

Imputation	%
1	74.2
2	73.8
3	71.4
4	71.9
5	70.9
6	73.3
7	75.0
8	75.4
9	73.1
10	74.3
Average	73.3

Source: SASAS 2006 Questionnaire 1

Therefore, just under three-quarters of respondents to the SASAS 2006 Questionnaire 1 had a per capita income of less than R847.4 per capita per month. The somewhat anomalous third imputation seemed to have no impact on the percentage falling below this threshold. Analysis was undertaken ten times of the percentages of people defining each of the 50 possible necessities as essential by this income variable (above/below R847.4 per capita per month) and the findings were averaged and are reported in the next section (Little and Rubin, 2000).

Findings

A total of 40 items were defined as essential by 50% or more of those who fell above the equivalised household income (EHI) threshold of R847.4 per capita per month. These include the 36 ‘essential for all’ items, plus a car (62%), a washing machine (55%), a lock-up garage for vehicles (54%) and a landline phone (51%). These

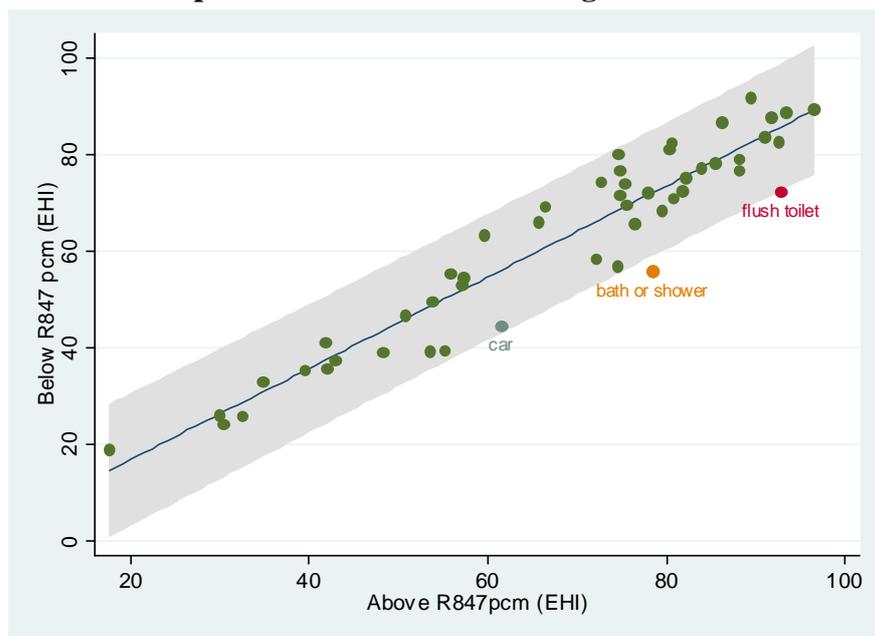
²⁹ Such a line is recommended by the UN in the absence of a pre-existing official poverty threshold (UN, 2003:7).

³⁰ The Consumer Price Index excluding interest rates on mortgage bonds (CPIX) was used rather than the standard Consumer Price Index as low income households would be largely unaffected by changes in mortgage bonds. The CPIX inflator was 1.429 whereas the standard CPI inflator was 1.360 for August 2006. (Statistics South Africa, 2007c).

'joiners' are the same as when the urban respondents were considered. For those who fell beneath the EHI threshold, a total of 35 items were defined as essential by 50% or more. The 'essential for all' item that dropped from the list was a garden (at just under 50%). Thirty-nine of the 50 items were defined as less essential by those beneath the EHI threshold than by those above this threshold.

The figure below shows the major outliers when comparing those above and below the EHI.

Figure 10 Percentage of respondents above and below the R847.4 per capita per month threshold defining each item as essential



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey

Spearman's Rank Correlation 0.92 $p < 0.01$

On average, people above the low income threshold (R847 per capita per month) defined 34 items as essential, whereas those below the low income threshold defined an average of 31 items as essential.

5.3 Minimum income question

This section explores whether respondents' definitions of necessities differ depending on whether people have a household income that is higher or lower than the amount they state that their household requires 'to make ends meet'. Respondents to SASAS 2006 Questionnaire 1 were asked 'What monthly income level do you consider to be minimal for your household, i.e. your household could not make ends meet with less?' (Q332), which can be seen as a minimum income question (MIQ). Eighty-eight percent of respondents answered this question (with a further 10.6% of cases answering 'don't know' and a further 1.4% of missing cases). It is therefore possible to compare responses to the definitional questions by whether people reported that

their household had an income that was more (or less) than the amount required by their household to make ends meet, for those who responded to this question.³¹

In order to compare people’s response to the MIQ with the household’s actual income, it was necessary to set the MIQ responses alongside the question relating to actual household income (i.e. Q330 mentioned in the section above) which, as has been shown, had a high percentage of missing, refused, unknown and implausible zero income responses. For this reason, the imputed household income values were used (as described above). Again, as for the EHI analysis in the section above, the analysis was undertaken ten times and then averaged (Little and Rubin, 2000).

Though the MIQ is unbanded, the question relating to the household’s actual income (Q330) is banded, and so in order to link the two questions, responses to the MIQ were assigned to the same set of bands as for the household’s reported actual income. On this basis it was possible to determine that on average 26% of respondents lived in households that had an income larger than the amount they felt they required to make ends meet (‘above MIQ’), 15% lived in households that were bringing in roughly the amount required to make ends meet (‘on MIQ’)³², and 47% of respondents lived in households that had an income that was less than the amount required to make ends meet (‘below MIQ’).³³

There are two additional questions in SASAS 2006 which can be used to explore how meaningful this derived MIQ is: Q151 ‘How satisfied are you about the income of your household?’, and Q155 ‘My household’s income is adequate for our needs - Strongly agree, agree, neither nor, disagree, strongly disagree, do not know’. These two questions do not measure precisely the same thing as the MIQ: Q151 focuses on satisfaction with the household income rather than the extent to which it is sufficient to *make ends meet*, and Q155 focuses on the adequacy of the household income to meet the household’s needs which also may be different from people’s interpretations of ‘making ends meet’. Nevertheless it is useful to see how they compare. Summaries of how the derived MIQ responses relate to Q151 and Q155 are tabulated below.³⁴

Table 10 Satisfaction with household income by derived MIQ

	Above MIQ	On MIQ	Below MIQ
% Very satisfied or satisfied about the income of household (Q151)	40	30	28
% Very dissatisfied or dissatisfied about the income of household (Q151)	43	56	59

Source: SASAS 2006 Questionnaire 1

³¹ This is an unconventional usage of the MIQ, but is useful for the purpose of this analysis as it captures groups who are reporting that they have more or less income than their household requires to make ends meet, and as such provides an indication of the extent to which people consider themselves to have access to sufficient or insufficient resources to ‘make ends meet’.

³² The unusual situation of being able to position people ‘on’ the threshold is caused by the use of banded income.

³³ This leaves just under 12% of cases unaccounted for as their responses to the MIQ were either missing or ‘do not know’.

³⁴ The figures in Tables 4.9 and 4.10 have not been averaged ten times (unlike the socially perceived necessities analysis by MIQ) but are instead based on the first of the ten income imputations.

As can be seen in **Table 10**, 40% of those whose household income is higher than the income required to make ends meet ('above MIQ') said that they were satisfied or very satisfied about their household's income. This is higher than for those whose household income is lower than the amount required to make ends meet (28%). Conversely, dissatisfaction with household income is greatest for those whose income is less than that required to make ends meet (59%).

The same pattern can be seen in **Table 11**, so the group of respondents whose household income is greater than that required to make ends meet agrees the most that their household income is adequate for their needs (54%). Similarly, the group that disagrees the most that their household income is adequate for their needs (51%) is the group whose household incomes are less than the amount they require to make ends meet.

Table 11 **Extent to which household income meets the household's needs by derived MIQ**

	Above MIQ	On MIQ	Below MIQ
% Strongly agreeing or agreeing that 'My household's income is adequate for our needs (Q155)	54	44	36
% Strongly disagreeing or disagreeing that 'My household's income is adequate for our needs' (Q155)	28	38	51

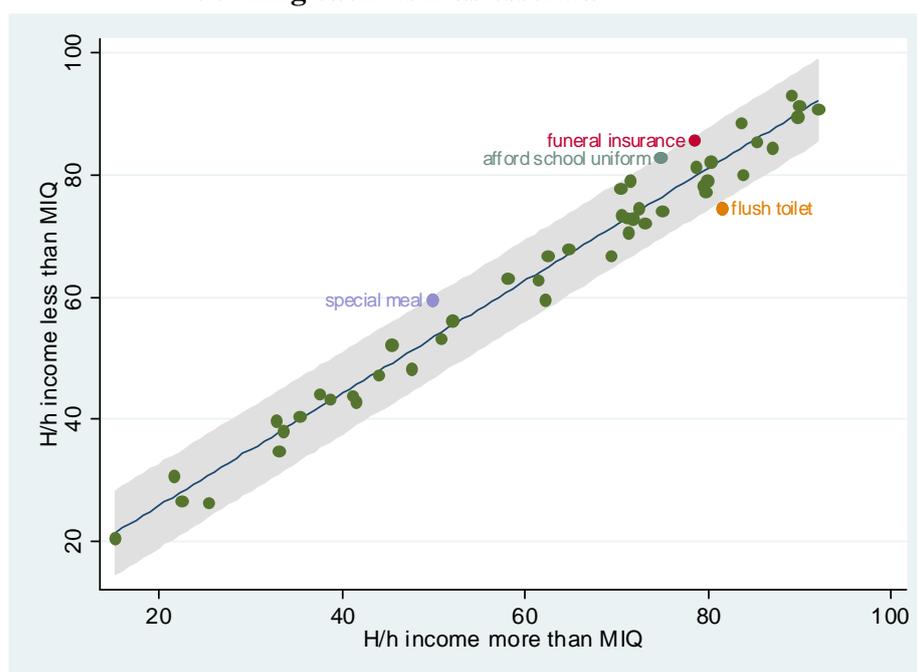
Source: SASAS 2006 Questionnaire 1

Though there is not a total match between Q151 and Q155 and the derived MIQ – and this should not be expected given the different focus of each of these questions – this analysis does demonstrate that the responses are in the 'right direction' in each instance.

Turning back to the derived MIQ itself, a total of 34 items were defined as essential by 50% or more of those whose incomes exceeded the amount required to make ends meet (i.e. 'above MIQ'). The two 'essential for all' items that fell from the list are a special meal at festival times (just under 50%) and a garden (45%). For those whose household income was less than the amount required to make ends meet, all 36 'essential for all' items were defined as essential by 50% or more of this group. In some respects it is not surprising, as almost half of respondents reported that their household income was less than that required to make ends meet, and therefore their responses to the definitional questions are likely on average to be similar to the overall response rates of all respondents. However, what is unexpected is that those who report that their household was bringing in more income than they require to make ends meet were in fact being slightly more parsimonious about the essentials: 37 of the 50 items are defined as more essential by those 'below MIQ' than those 'above MIQ'. The MIQ is therefore capturing a rather different set of respondents than seem to have been captured by the SDPS and the EHI.

The figure below shows the major outliers when comparing those whose household income is less than the amount that the respondent says that their household requires to make ends meet, and those whose household income is greater than the amount required to make ends meet (i.e. below and above the MIQ respectively).

Figure 11 Percentage of respondents with incomes below and above the MIQ defining each item as essential



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman's Rank Correlation 0.97 $p < 0.01$

5.4 Food insecurity

A final way of exploring how the views of very poor people may differ from other groups is to consider households where people have gone hungry because there was not enough money to buy food. Overall in the survey, 12.5% of respondents said that over the past year children in their household had gone hungry for this reason, and separately 17.5% of respondents said that other members of the household had gone hungry for this reason.³⁵ If one combines these two indicators, a total of 17.8% of respondents reported that over the past year someone in their household had gone hungry due to lack of money for food, and so the analysis in this section is based on the latter question 'In the past year did other members of the household go hungry because there was not enough money to buy food?' (Q329).³⁶ A simple comparison is made here between those who answered 'yes' and those who answered 'no'. This can be seen as a proxy for food insecurity, which refers to long-term and short-term nutrition deprivation, and as such suggests the presence of extreme levels of poverty (Drimie and Mini, 2003).

A total of 34 items were defined as essential by 50% or more of respondents who reported that 'other members' of their household had gone hungry in the previous year. The two 'essential for all' items to drop from the list were a bath/shower in the

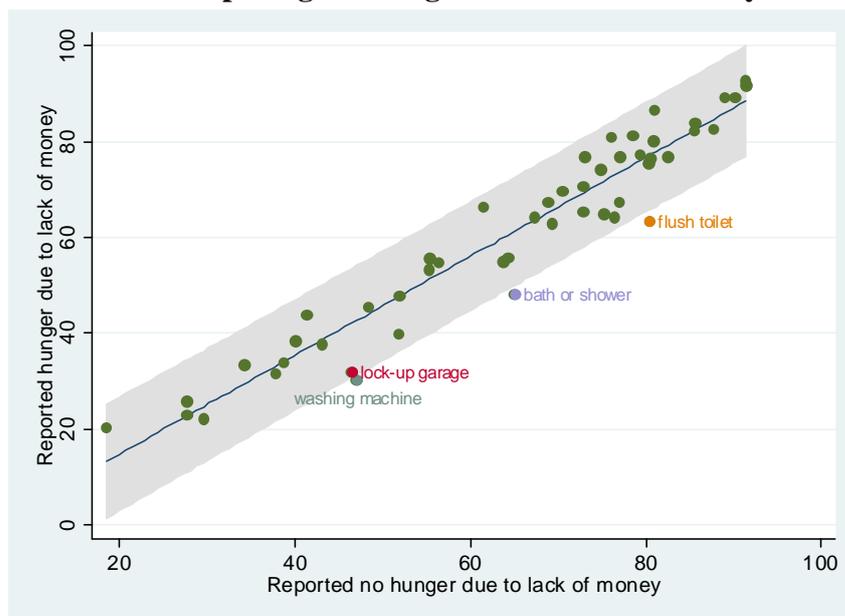
³⁵ Presumably this question was intended to include the respondents themselves but this is left ambiguous in the wording of the questionnaire.

³⁶ 17.5% of respondents responded 'yes', 78% said 'no', less than half a percent said 'do not know', and 4% said 'not applicable'.

house (48% compared with 65% of those who had reported no hunger incidents) and a garden (48% compared with 52% of those who had reported no hunger incidents). For those who reported no hunger incidents, 37 items were defined as essential by a majority. The item to join the list was a car (52% compared with 40% for those who had reported a hunger incident).

Only 11 items were defined as more essential by those who reported a hunger incident than by those who had reported no hunger incidents: ability to pay or contribute to funerals/funeral insurance/burial society (the greatest difference), a cell phone, someone to talk to if you are feeling upset or depressed, a radio, ability to buy school uniform without hardship, money for presents on special occasions, satellite television, someone to look after you if you are very ill, and some new clothes. Sixty-four percent of those who reported no hunger incidents defined ‘meat, fish or vegetarian equivalent every day’ as essential, compared with 56% of those who had reported a hunger incident. The figure below shows the major outliers when comparing those who reported that other members of the household had gone hungry due to lack of money in the past year, and those who reported that this had not happened.

Figure 12 Percentage of respondents defining each item as essential, by reportage of hunger due to lack of money in the past year



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman’s Rank Correlation 0.95 p<0.01

6 The ‘essentials’ by class

There is a growing debate in the South African context about whether poverty has become less racialised and instead been superseded by class divisions in the country (e.g. Seekings, 2007b). The traditional definitions of class which are based on occupational status (e.g. Goldthorpe and McKnight, 2004) cannot easily be applied to

the South African context because of the presence of such high levels of unemployment and people working in the informal sector. In some instances ‘Almost any family that is not grindingly poor gets to be ‘middle class’’ (Centre for Policy Studies, 2006: 23), though a sophisticated ten-class schema has been recently developed by Seekings and Natrass (2005). In a recent study in Cape Town relationships were found between occupational class, race and education, but the relationship between occupational class, income and self-reported class was less clear (Seekings, 2007a).

This subsection uses questions in SASAS which serve as proxies for class in the South African context: educational status, employment and occupational status, and finally a particularly relevant question which asks people to rank themselves by status in society.³⁷

6.1 Educational status

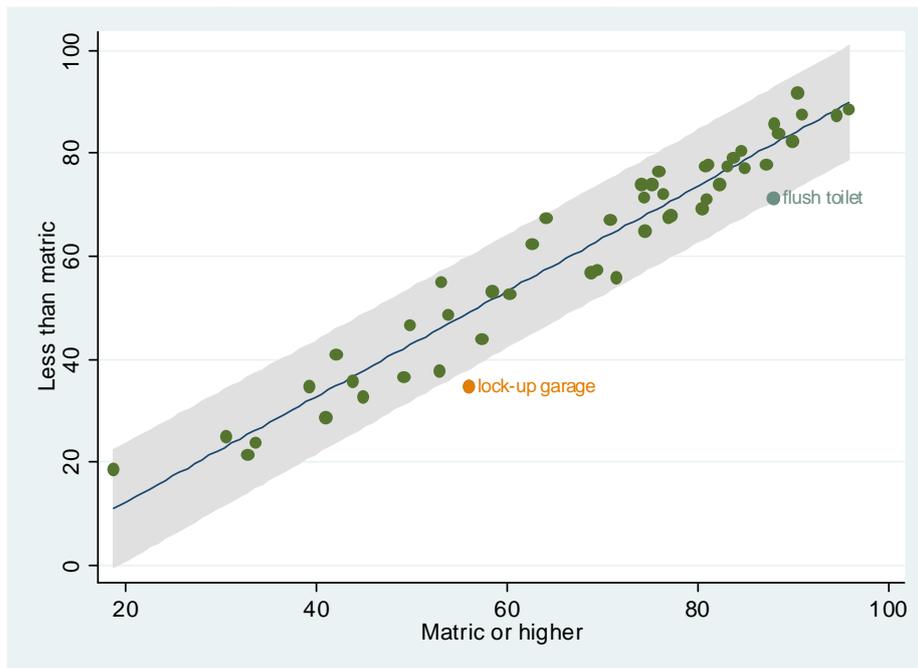
This section considers how people’s definitions of necessities vary by educational status. Q278 in the survey asks: ‘What is the highest level of education that you have ever completed?’ Twenty-two different potential responses were offered which can be grouped into three categories: ‘less than matric’ (61%), ‘matric or higher’ (39%), and ‘other’ (less than half a percent of all responses, which is a combination of missing, ‘other’ and ‘don’t know’ responses). ‘Less than matric’ includes those who had had no schooling (6% of all respondents) through to those who had attended school but had not completed the matric year. ‘Matric or higher’ includes people who had completed the matric year at school (Grade 12/Standard10/Form 5) right through to those who had a postgraduate degree or diploma.

Fifty percent or more of the ‘less than matric’ group defined 35 items as essential. The ‘essential for all’ item which just fell from the list was the garden (49%). In contrast, 39 items were defined as essential by the majority of the ‘matric or higher’ group. This included all 36 ‘essential for all’ items. The three items to join the list were a car (57% for ‘matric or higher’ compared with 44% for ‘less than matric’), a lock up garage (56% and 35% respectively), and a washing machine (53% and 38% respectively).

Forty-three of the 50 items were defined as more essential by the ‘matric or higher’ group than the ‘less than matric’ group. Two items were equally important for both groups, though to varying extents: a cell phone (63% for both groups) and a satellite television (19% for both groups). The figure below shows the most extreme outliers when these two groups are compared, for the 50 definitional items.

³⁷ This is different from Seekings’ self-reported class question which asked ‘People sometimes think of themselves as being in a class. Would you say that you are in the upper class, middle class, working class or lower class?’ (Seekings, 2007a: 13).

Figure 13 Percentage of respondents defining each item as essential, by highest level of education completed



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman's Rank Correlation 0.96 ($p < 0.01$)

6.2 Employment status and occupation

This section explores how people's responses about necessities differ by employment and occupation status. In SASAS people were asked 'what is your current employment status?' (Q283). Ninety-nine percent of respondents answered this question and the table below shows their responses. As can be seen, 37.5% of respondents were unemployed (the majority of whom were looking for work) or operating as a housewife whilst looking for work (i.e. groups 1, 2 and 7). A further 34.5% of respondents were employed or self-employed, either part- or full-time (i.e. groups 9, 10, 11 and 12). If one excludes the other groups (housewives not looking for work, pensioners, people who are temporarily sick or long-term disabled, students and 'other'), it is possible to compare the two groups described above, which can be loosely called 'unemployed' and 'employed'. These three aggregated groups therefore comprise people who can be categorised as 'unemployed' (37%), 'employed' (34%) and 'other' (29%).

Table 12 Current employment status of respondents

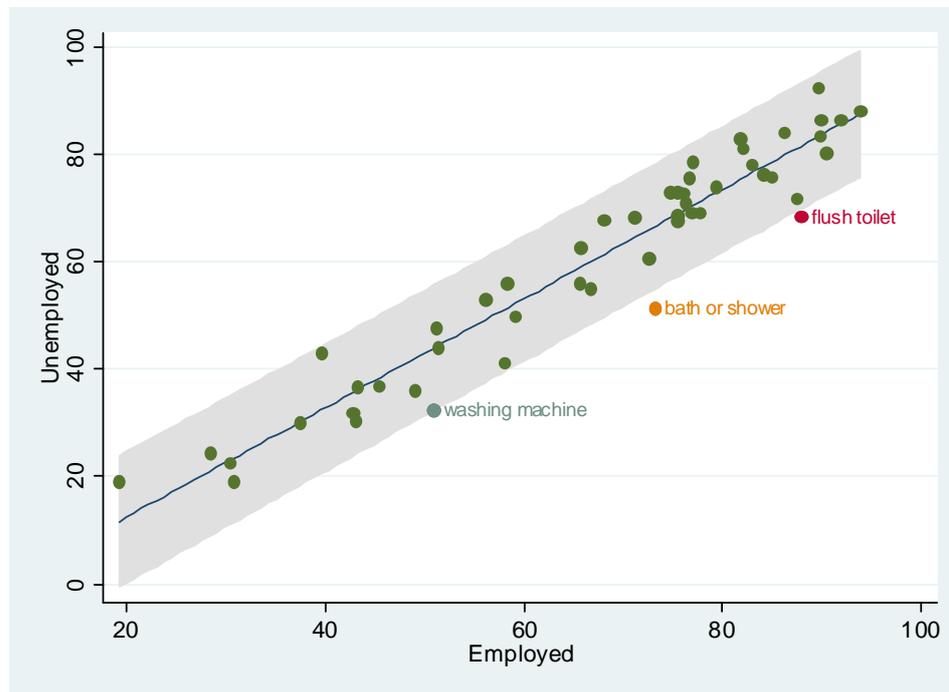
Employment status	%
1 - Unemployed, not looking for work	5.3
2 - Unemployed, looking for work	30.5
3 - Pensioner (aged/retired)	10.2
4 - Temporarily sick	1.1
5 - Permanently disabled	1.2
6 - Housewife, not working at all, not looking for work	2.6
7 - Housewife, looking for work	1.7
8 - Student/learner	12.3
9 - Self-employed – full time	5.3
10 - Self-employed – part time	2.2
11 - Employed part time (if none of the above)	6.3
12 - Employed full time	20.7
13 – Other	0.7
Total	100

Source: SASAS 2006 Questionnaire 1

Fifty percent or more of unemployed respondents defined 34 items as essential. The two ‘essential for all’ items to fall from the list were a sofa/lounge suite (just under 50%) and a garden (48%). In contrast, employed respondents defined 39 items as essential. In addition to the 36 ‘essential for all’ items, a majority defined a car (58%), a landline phone and a washing machine (both 51%) as essential.

Only 4 of the 50 items were defined as more essential by unemployed respondents than employed respondents (all less than 4% difference): ‘having an adult from the household at home at all times when children under ten from the household are at home’, ‘for parents or other carers to be able to buy complete school uniform for children without hardship’, someone to look after you if you are very ill, and money for presents for special occasions.

Figure 14 Percentage of unemployed and employed respondents defining each item as essential



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman's Rank Correlation 0.95 ($p < 0.01$)

The figure above shows the greatest outliers – flush toilet, bath/shower and washing machine.

This distinction between employed and unemployed is again only a very crude proxy for class. It is possible to slightly refine the measure by using another question in the survey: 'What is your current occupation?' (Q284). This question was answered by just over 99% of all respondents. The table below provides a breakdown of people's responses.

Table 13 Current occupation of respondents

Current Occupation	%
N.A. never had a job	26.4
Legislators, snr officials, managers	1.7
Professionals	2.6
Technicians & associate professionals	4.3
Clerks	4.8
Service, shop & market sales workers	6.7
Skilled agricultural & fishery	0.9
Craft & related trades workers	4.2
Plant & machine operators & assemblers	4.5
Elementary occupations	18.6
Informal sector, not specified	0.0
Occupations unspecified	0.3
Unemployed, occup unspecified	4.2
Occup in informal sect, not class	0.0
Occup not elsewhere classified	0.1

Occup not adequately defined	1.4
Self-employed	4.6
Homemakers: Housewives, Househusbands	1.4
Children,not scholars or students	0.2
Scholars; Students	7.4
Pensioners&other not econ.active,>65y	3.4
Labour-Disabled,15 to 65 years	0.3
Not economically active persons not elsewhere class	0.0
Refused to answer	1.0
Undetermined, don't know	1.0
Total	100

Source: SASAS 2006 Questionnaire 1

As can be seen in **Table 13**, the numbers of employed people in non-elementary jobs are too small to create a refined set of sub-categories. A crude set of four categories was therefore constructed for people of working age (15 to 65 inclusive): 'never had a job' (28%); 'employed: non-elementary'³⁸ (30%); 'employed: elementary'³⁹ (18%); and 'other' (25%).⁴⁰ **Table 14** shows the correlations between the responses of the first three of these groups: the highest correlation is between people who have never had a job, and those who are employed in an elementary job.

Table 14 Spearman's Rank Correlations by occupational status (for all 50 definitional items)

	Never had a job	Employed - not elementary	Employed - elementary
Never had a job	1.0000		
Employed – not elementary	0.9186*	1.0000	
Employed – elementary	0.9533*	0.9459*	1.0000

Source: SASAS 2006 Questionnaire 1

Note: * = p<0.01. This table just includes people of working age (15-65 inclusive).

Fifty percent or more of those who reported that they had never had a job defined 35 items as essential. The one item to drop from the 'essential for all' list was the sofa/lounge suite (47%). A majority of people in elementary occupations defined 34 items as essential. The items that dropped from the 'essential for all' list were new clothes and a garden (48% and 44% respectively). The majority of those who were in non-elementary occupations defined 37 items as essential. The one item to drop from the 'essential for all' list was the garden (48%), and the two items that joined were a car (57%) and a washing machine (53%).

Thirty-eight of the 50 items were defined as more essential by those with non-elementary occupations than by those who had never been in work: the greatest difference being for a bath/shower in the house (74% and 51% respectively), followed

³⁸ The 'non-elementary' occupational status includes legislators through to plant or machine operators.

³⁹ 'Elementary' would include people in sales and services elementary occupations, agricultural, fishery and related labourers, and labourers in mining, construction, manufacturing and transport.

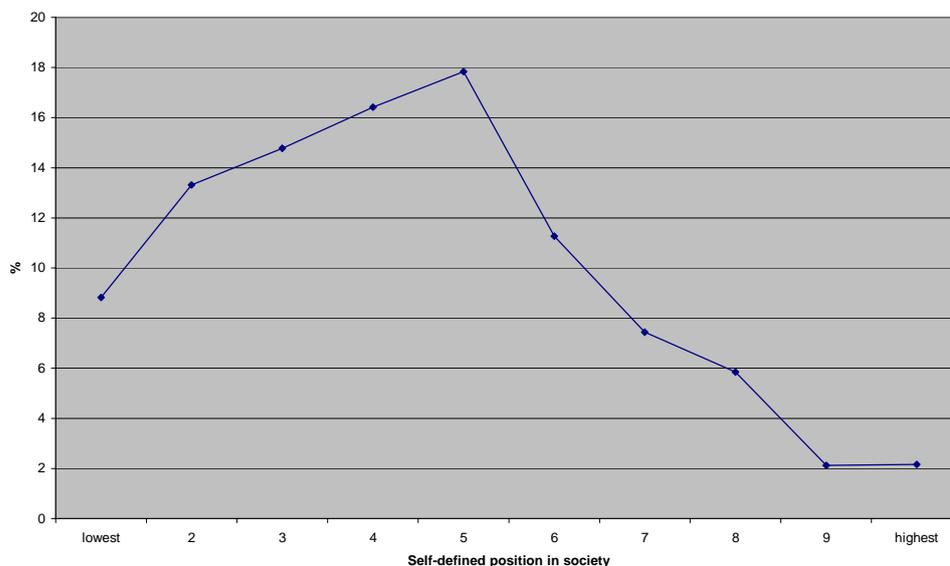
⁴⁰ These groupings are 'crude' because some of the categories could overlap with the first category 'never had a job', such as homemakers, children, scholars and pensioners. Therefore the 'never had a job' group may be smaller than it might have been if the other categories had not been asked about.

by a washing machine. Also, 38 items were defined as more essential by those with non-elementary occupations than by those with elementary occupations, and again the differences were greatest for the bath/shower in the house and the washing machine – both of which are items which depend on plumbing in the house.

6.3 Self-defined social status

Finally, this section explores how people’s responses differ in terms of the necessities in life, depending on how they position themselves within their society. Question 288 in the survey asks: ‘In our society there are groups which tend to be towards the top and groups which tend to be towards the bottom. Where would you put yourself on a scale of 1 to 10, where 10 is the top and 1 the bottom?’. The figure below shows – for those who responded - the percentage of respondents who placed themselves within each of the groups. In total, 71% placed themselves in the lower five groups, 29% placed themselves in the top five groups and less than half a percent declined to respond.

Figure 15 Self-defined social status

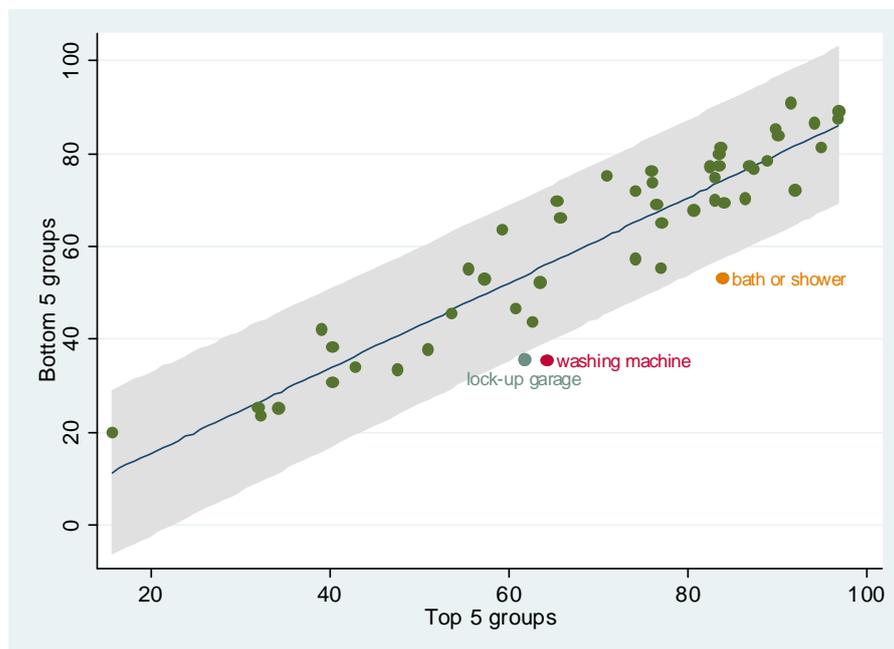


Source: SASAS 2006 Questionnaire 1

Thirty-five items were defined as essential by people in the bottom five groups. The item that fell from the list was the garden (47% defined it as essential). In contrast, 41 items were defined as essential by people in the top five groups: the additional items to the 36 ‘essential for all’ items were: washing machine (64% for those in the top five groups, compared with 35% for those in the bottom five groups), a car (63% and 44% respectively), a lock-up garage (62% and 36% respectively), a garden (61% and 47% respectively), a landline phone (54% and 46% respectively), and ‘a small amount of money to spend on yourself not on your family each week’ (51% and 38% respectively).

The figure below shows the most extreme outliers when these two groupings are compared, for the 50 definitional items.

Figure 16 Percentage of respondents defining each item as essential by self-defined social status



Source: SASAS 2006 Questionnaire 1

Note: 95% confidence interval (based on standard error of the forecast) shown in grey
Spearman's Rank Correlation 0.90 ($p < 0.01$)

7 Concluding remarks

This paper has considered the responses to the definitional questions contained in the socially perceived necessities module in SASAS 2006. Responses were compared by sex, population group, age, area, poverty status and proxies for class. **Annex 1** provides a summary of each of the variables used in this paper, including the number of items defined as essential by the majority of each category or subgroup. The final column in the table in **Annex 1** shows Cronbach's coefficient alpha score for each of the subgroups' set of necessities: each set of necessities for each of the subgroups is highly reliable (Cronbach, 1951).

To what extent is there agreement between the different subgroups regarding the necessities of life, and how do they compare with the overall list of 36 socially perceived necessities which were defined as essential by 50% or more of the total population? The table below (**Table 15**) summarises how many of the 36 socially perceived necessities were common across each of the different sets of subgroups of the population. For example, a common set of 35 of the 36 'essential for all' socially perceived necessities were defined as essential by the majority of women and by the majority of men.

Overall a majority of each of the subgroups considered in this paper defined a common set of 26 of the 36 'essential for all' items as essential. These are asterisked

in **Table 1** (and comprise 25 of the top 26 items - the exception being the radio which is defined as much less essential by Indian/Asian respondents than by all the other subgroups considered in this paper). These 26 items have each been defined as essential by the majority of people overall, and broken down by sex, age, population group, area, four types of poverty definition and four proxies for class.

Table 15 **Number of socially perceived necessities in common between different subgroups**

Variable	Number of socially perceived necessities in common ⁴¹
Sex	35
Population Group ⁴²	29
Age ⁴³	32
Area ⁴⁴	31
Poverty Status ⁴⁵	32
Proxies for Class ⁴⁶	33

Instead of defining socially perceived necessities as items which the majority of the population overall defines as essential, they could be defined as items which 50% or more of *all* of the subgroups considered in this paper defined as essential. This would result in the list of socially perceived necessities being reduced from 36 to these 26 items. However, this would be a ‘lowest common denominator’ approach which, seemingly unreasonably, gives small groups the ‘power of veto’ (e.g. the radio, which was defined as essential overall by 74% of the population, but only by 44% of Indian/Asian respondents).

The level of agreement that exists across different groups regarding necessities resonates with Clark’s findings in South Africa where, in his smaller study (of 157 people in 1998) which focused on people’s definitions of functional capabilities, he found that ‘the apparent scale of the consensus is remarkable’ (Clark, 2003: 188) (though he does not quantify it due to the small number of people involved in the survey). He too found that:

⁴¹ This column shows the number of socially perceived necessities (i.e. the 36 items shown in bold in Table 1) which are defined as essential by more than 50% of each of the subgroups considered within a particular variable, e.g. by men and by women in row one.

⁴² The subgroups considered in this row are black African, coloured, Indian/Asian and white.

⁴³ The subgroups considered in this row are people aged 16-24, 25 and over, 16-64, and 65 and over.

⁴⁴ The subgroups considered in this row are people living in urban and rural areas

⁴⁵ People who defined themselves and their family as wealthy/very comfortable/reasonably comfortable, people who said they were ‘just getting along’ and people who said they were poor or very poor (SDPS); people above and below the equivalised household income threshold of R847.4 per capita per month (EHI); people whose households were bringing in more, or less than, the required amount to make ends meet (MIQ); and people who reported that someone in the household had gone hungry in the previous year due to lack of resources and those who reported that this had not taken place.

⁴⁶ People with an educational levels less than matric, and people with matric or higher; people who were unemployed and people who were employed; people of working age who had never had a job, had an elementary occupational status, and had a non-elementary occupational status; people who defined themselves as being in the bottom 50% of the social groupings in South Africa, and people who defined themselves as being in the top 50% of the social groupings.

‘people’s wants, hopes and expectations were *not* crushed by the harsh realities of life. Respondents were aware of the better things in life, but chose to emphasise their most *urgent* needs.’ (Clark, 2003: 185).

There are a number of possible different reasons why such a high level of agreement may exist in South Africa in terms of the benchmarks that people set for an acceptable standard of living. One is that the existence of the new democratic regime means that people who had previously been oppressed under the apartheid regime now consider themselves to have an equal chance – or at least an equal right - to enjoy the standard of living that was being enjoyed (and still is only enjoyed) by a small minority of the population. The growing amount of electrification across the country also means that people have greater access to television programmes, films and the media and can see different standards of living from their own homes.⁴⁷ Third, the highly migrant nature of many people’s lives in South Africa means that details about city life are constantly being brought to rural areas and vice versa (Oosthuizen and Naidoo, 2004; Posel and Casale, 2006; Wentzel *et al.*, 2006). Fourth, the increasing levels of tourism in the country – whether foreigners visiting the country or South Africans visiting different parts of South Africa – mean that there is an ever increasing knowledge of how other people live. Finally, as Clark observes:

‘Aspects of the First World and the Third World are visibly in close proximity. Thus even the poorest and most deprived of its citizens are explicitly faced with at least one possible vision of a good life.’ (Clark, 2003: 179)

In spite of a few exceptions which have been identified in this paper, there is therefore a high level of agreement in terms of what is essential for an acceptable standard of living in present-day South Africa. As well as the common set of 26 items, this is also evidenced by the high correlations between different subgroups’ responses to the definitional module. Almost all of the between-subgroup correlation coefficients presented in this paper were 0.9 or higher.⁴⁸

Just as in the focus groups, the picture that emerges when one considers the list of socially perceived necessities is of a standard of living which is not restricted to issues merely relating to survival and nor is it oriented around consumerism and excess.

The extent of agreement between different groups about the necessities in life was very striking: of the top 26 items defined as essential by the total population, 25 of these were defined as essential by the majority of women, men, older and young people, and people in the four main population groups.

On average, respondents defined 32 of the 50 items as essential and this hardly varied by population group. Given the wide range of incomes across the population, it is also an unexpected finding that on average 34 items were defined as essential by people above the low income threshold (R847 per capita per month) compared to only three fewer items (31) for those below the low income threshold.

⁴⁷ Household possession of a television rose from 54% to 66% between 2001 and 2007 (Statistics South Africa, 2007b: 54).

⁴⁸ The correlations are between different subgroups within a particular category or variable, in relation to the percentage of each subgroup defining each of the 50 items that were included in the definitional module as ‘essential’, e.g. the correlation between male and female responses. The correlations are rounded here to one decimal place.

Though an acceptable standard of living – as defined by the population at large – is not enjoyed by many people in the population, there is a remarkable level of agreement between groups about what that standard of living comprises. In a country that is still recovering from the legacies of colonialism and apartheid this is an important and quite unexpected finding. It provides us with an impression of where people are setting their sights (or threshold of adequacy) in relation to an acceptable standard of living.

Annex 1 Summary of sub-group variables

Table 1 Summary of sub-group variables

Variable	Category	Original Variable (and number of responses)	Derived Variable (and number of responses)	N	Weighted % (of derived variable)	No. items defined as essential by 50% or more of this group (max 50)	Cronbach's Coefficient Alpha
All	Total population	n/a (2904)	n/a (2904)	2904	100	36	0.9201
Sex	Women	Q270 (2903)	n/a (2903)	1716	51.4	37	0.9186
	Men			1187	48.7	36	0.9252
Age	16-24 year olds	Q272 (2902)	Ag1624 (2904)	565	27.6	37	0.9230
	25 and over		Ag25pl (2904)	2337	72.3	36	0.9197
	65 and over		Ag65pl (2904)	262	8.4	36	0.8959
	16-64 year olds		Ag1664 (2904)	2640	91.6	35	0.9205
Population Group	Black African	Q271 (2903)	n/a (2903)	1834	76.6	36	0.9280
	Coloured			480	9.4	34	0.8956
	Indian/Asian			279	2.8	32	0.8231
	White			310	11.3	39	0.9101
Area	Urban	Geo_type (2904)	Urban (2904)	1917	62.8	40	0.9130
	Rural		Rural (2904)	987	37.2	31	0.9255

Variable	Category	Original Variable (and number of responses)	Derived Variable (and number of responses) ⁴⁹	N	Weighted % (of derived variable)	No. items defined as essential by 50% or more of this group (max 50)	Cronbach's Coefficient Alpha
Self-defined poverty status (SDPS)	Not poor	Q150 (2887)	Comfy=1 (2887)	964	33.0	42	0.9169
	Just getting along		Comfy=2 (2887)	1047	38.5	35	0.9136
	Poor		Comfy=3 (2887)	876	28.6	32	0.9127
Equivalised Household Income (EHI)	Below R847.4 per capita per month	Q330 (2904 post-imputation)	aboveR847_1=0 (2904)	1980 (imp1)	74.2 (imp1)	35 (av result using the 10 imputations)	0.9186 (imp1)
	Above R847.4 per capita per month		AboveR847_1=1 (2904)	924 (imp1)	25.8 (imp1)	40 (av result using the 10 imputations)	0.9273 (imp1)
Minimum Income Question (MIQ)	Income below amount required to make ends meet	Q332 (2862)	Miq_1=3 (2904)	1291 (imp1)	47.6 (imp1)	36 (av result using the 10 imputations)	0.9047 (imp1)
	Income above amount required to make ends meet		Miq_1=1 (2904)	797 (imp1)	25.4 (imp1)	34 (av result using the 10 imputations)	0.9234 (imp1)
Food Insecurity	Hungry	Q329 (2881)	n/a (2881)	474	17.4	34	0.9182
	Not hungry			2235	78.0	37	0.9174
Educational Status	Less than matric	Q278 (2884)	Edu=1 (2904)	1876	60.7	35	0.9163
	Matric or higher		Edu=2 (2904)	1010	38.9	39	0.9134
Employment Status	Unemployed	Q283 (2861)	Emp=1 (2904)	971	37.1	34	0.9176
	Employed		Emp=2 (2904)	1092	34.2	39	0.9247

⁴⁹ The derived variables miq, edu, emp, occ and class had a 'none of the above' category which caused the total number of cases to rise to 2904.

Variable	Category	Original Variable (and number of responses)	Derived Variable (and number of responses)⁵⁰	N	Weighted % (of derived variable)	No. items defined as essential by 50% or more of this group (max 50)	Cronbach's Coefficient Alpha
Occupational Status	Never had a job	Q284 (2880)	Occ=1 (2904)	608	26.3	35	0.9206
	Employed elementary		Occ=3 (2904)	698	18.5	35	0.9161
	Employed non-elementary		Occ=2 (2904)	903	29.5	37	0.9090
Self-defined social status	Bottom half	Q2880 (2885)	Class=1 (2904)	2031	70.9	35	0.9207
	Top half		Class=2 (2904)	854	28.7	41	0.8930

Source: SASAS 2006 Questionnaire 1

⁵⁰ The derived variables miq, edu, emp, occ and class had a 'none of the above' category which caused the total number of cases to rise to 2904.

Annex 2 The Socially Perceived Necessities Module in SASAS 2006

DEFINITIONS OF POVERTY AND SOCIAL EXCLUSION

Please say whether you think each of the following is essential for everyone to have in order to enjoy an acceptable standard of living in South Africa today. If you think it is essential please say 'ESSENTIAL'. If you think it is desirable but not essential please say 'DESIRABLE'. If you think it is not essential and not desirable please say 'NEITHER'. So the three possible answers are 'ESSENTIAL', 'DESIRABLE' or 'NEITHER'.

	Item	Essential	Desirable	Neither	(Do not know)
1.	A fridge	1	2	3	8
2.	Having enough money to give presents on special occasions such as birthdays, weddings, funerals	1	2	3	8
3.	Meat or fish or vegetarian equivalent every day	1	2	3	8
4.	A landline phone	1	2	3	8
5.	Special meal at Christmas or equivalent festival	1	2	3	8
6.	Washing machine	1	2	3	8
7.	Clothing sufficient to keep you warm and dry	1	2	3	8
8.	For parents or other carers to be able to afford toys for children to play with	1	2	3	8
9.	Satellite Television/DSTV	1	2	3	8
10.	Some new (not second-hand or handed-down) clothes	1	2	3	8
11.	Regular savings for emergencies	1	2	3	8
12.	A small amount of money to spend on yourself not on your family each week	1	2	3	8
13.	Ability to pay or contribute to funerals/funeral insurance/burial society	1	2	3	8
14.	A cell phone	1	2	3	8
15.	Television/ TV	1	2	3	8
16.	A car	1	2	3	8
17.	People who are sick are able to afford all medicines prescribed by their doctor	1	2	3	8
18.	A sofa/lounge suite	1	2	3	8
19.	A computer in the home	1	2	3	8
20.	An armed response service for the house	1	2	3	8
21.	A DVD player	1	2	3	8
22.	For parents or other carers to be able to buy complete school uniform for children without hardship	1	2	3	8
23.	A radio	1	2	3	8
24.	Burglar bars in the house	1	2	3	8
25.	Mains electricity in the house	1	2	3	8
26.	A flush toilet in the house	1	2	3	8
27.	Separate bedrooms for adults and children	1	2	3	8
28.	A fence or wall around the property	1	2	3	8
29.	A garden	1	2	3	8
30.	A house that is strong enough to stand up to the weather e.g. rain, winds etc.	1	2	3	8
31.	A bath or shower in the house	1	2	3	8
32.	A burglar alarm system for the house	1	2	3	8

33.	A lock-up garage for vehicles	1	2	3	8
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Please say whether you think each of the following activities are essential for everyone to be able to do in South Africa today. If you think they are essential please say 'ESSENTIAL'. If you think they are desirable but not essential please say 'DESIRABLE'. If you think they are not essential and not desirable please say 'NEITHER'.

	Activity	Essential	Desirable	Neither	(Do not know)
34.	A holiday away from home for one week a year, not visiting relatives	1	2	3	8
35.	Paid employment for people of working age	1	2	3	8
36.	Being able to visit friends and family in hospital or other institutions	1	2	3	8
37.	A family take-away or bring-home meal once a month	1	2	3	8

I am now going to read you a list of features relating to neighbourhoods. Please say whether you think each of the following are essential for everyone to have in South Africa today. If you think it is essential please say 'ESSENTIAL'. If you think it is desirable but not essential please say 'DESIRABLE'. If you think it is not essential and not desirable please say 'NEITHER'.

	Item	Essential	Desirable	Neither	(Do not know)
38.	Tarred roads close to the house	1	2	3	8
39.	Street lighting	1	2	3	8
40.	A place of worship (church/mosque/synagogue) in the local area?	1	2	3	8
41.	A neighbourhood without smoke or smog in the air	1	2	3	8
42.	A neighbourhood without rubbish/refuse/garbage in the streets	1	2	3	8
43.	Having police on the streets in the local area	1	2	3	8
44.	A large supermarket in the local area	1	2	3	8
45.	Somewhere for children to play safely outside of the house	1	2	3	8

I am now going to ask you some questions about people's relationships with their friends and family. Please say whether you think each of the following are essential for everyone to have in South Africa today. If you think it is essential please say 'ESSENTIAL'. If you think it is desirable but not essential please say 'DESIRABLE'. If you think it is not essential and not desirable please say 'NEITHER'.

	Item	Essential	Desirable	Neither	(Do not know)
46.	Someone to look after you if you are very ill	1	2	3	8
47.	Having an adult from the household at home at all times when children under ten from the household are at home	1	2	3	8
48.	Someone to lend you money in an emergency	1	2	3	8
49.	Someone to transport you in a vehicle if you needed to travel in an emergency	1	2	3	8
50.	Someone to talk to if you are feeling upset or depressed	1	2	3	8

MEASUREMENT OF POVERTY AND SOCIAL EXCLUSION

Please say whether you have each of the following. If you do not have the item please say whether you don't have it and don't want it, or don't have it and can't afford it. So the three possible answers are 'HAVE', 'DON'T HAVE AND DON'T WANT' or 'DON'T HAVE AND CAN'T AFFORD'.

	Item	Have	Don't have and don't want	Don't have and can't afford	(Do not know)
51.	A fridge in the household	1	2	3	8
52.	Having enough money to give presents on special occasions such as birthdays, weddings, funerals	1	2	3	8
53.	Meat or fish or vegetarian equivalent every day	1	2	3	8
54.	A landline phone in the household	1	2	3	8
55.	Special meal at Christmas or equivalent festival	1	2	3	8
56.	Washing machine in the household	1	2	3	8
57.	Clothing sufficient to keep you warm and dry	1	2	3	8
58.	Toys for children to play with (if you have children)	1	2	3	8
59.	Satellite Television/DSTV in the household	1	2	3	8
60.	Some new (not second-hand or handed-down) clothes	1	2	3	8
61.	Regular savings for emergencies	1	2	3	8
62.	A small amount of money to spend on yourself not on your family each week	1	2	3	8
63.	Ability to pay or contribute to funerals/funeral insurance/burial society	1	2	3	8
64.	A cell phone	1	2	3	8
65.	Television/ TV in the household	1	2	3	8
66.	A car in the household that you can use	1	2	3	8
67.	Medicines prescribed by your doctor when you are ill	1	2	3	8
68.	A sofa/lounge suite in the household	1	2	3	8
69.	A computer in the household	1	2	3	8
70.	An armed response service for the house	1	2	3	8
71.	A DVD player in the household	1	2	3	8
72.	School uniforms for children (if you have children)	1	2	3	8
73.	A radio in the household	1	2	3	8
74.	Burglar bars in the household	1	2	3	8
75.	Mains electricity in the house	1	2	3	8
76.	A flush toilet in the house	1	2	3	8
77.	Separate bedrooms for adults and children	1	2	3	8
78.	A fence or wall around the property	1	2	3	8
79.	A garden	1	2	3	8
80.	A house that is strong enough to stand up to the weather e.g. rain, winds etc.	1	2	3	8
81.	A bath or shower in the house	1	2	3	8
82.	A burglar alarm system for the household	1	2	3	8
83.	A lock-up garage for vehicles	1	2	3	8

Please say whether you are able to do the following activities. If you don't do them please say whether you don't do them because you don't want to do them, or you don't do them because you can't afford to. So the three possible answers are 'DO', 'DON'T DO AND DON'T WANT TO DO' or 'DON'T DO AND CAN'T AFFORD'.

	Activity	Do	Don't do and don't want to do	Don't do and can't afford	(Do not know)
84.	A holiday away from home for one week a year, not visiting relatives	1	2	3	8
85.	Being able to visit friends and family in hospital or other institutions	1	2	3	8
86.	A family take-away or bring-home meal once a month	1	2	3	8

I am now going to read you a list of features relating to neighbourhoods. Please say whether you have them or not. So the two possible answers are 'HAVE' and 'DON'T HAVE'.

	Item	Have	Don't Have	(Do not know)
87.	Tarred roads close to the house	1	2	8
88.	Street lighting	1	2	8
89.	A place of worship (church/mosque/synagogue) in the local area?	1	2	8
90.	A neighbourhood without smoke or smog in the air	1	2	8
91.	A neighbourhood without rubbish/refuse/garbage in the streets	1	2	8
92.	Having police on the streets in the local area	1	2	8
93.	A large supermarket in the local area	1	2	8
94.	Somewhere for children to play safely outside of the house	1	2	8

I am now going to ask you some questions about your relationships with friends and family. Please say whether you have or don't have access to these. So the two possible answers are 'HAVE' and 'DON'T HAVE'.

	Item	Have	Don't Have	(Do not know)
95.	Someone to look after you if you are very ill	1	2	8
96.	Having an adult from the household at home at all times when children under ten from the household are at home	1	2	8
97.	Someone to lend you money in an emergency	1	2	8
98.	Someone to transport you in a vehicle if you needed to travel in an emergency	1	2	8
99.	Someone to talk to if you are feeling upset or depressed	1	2	8

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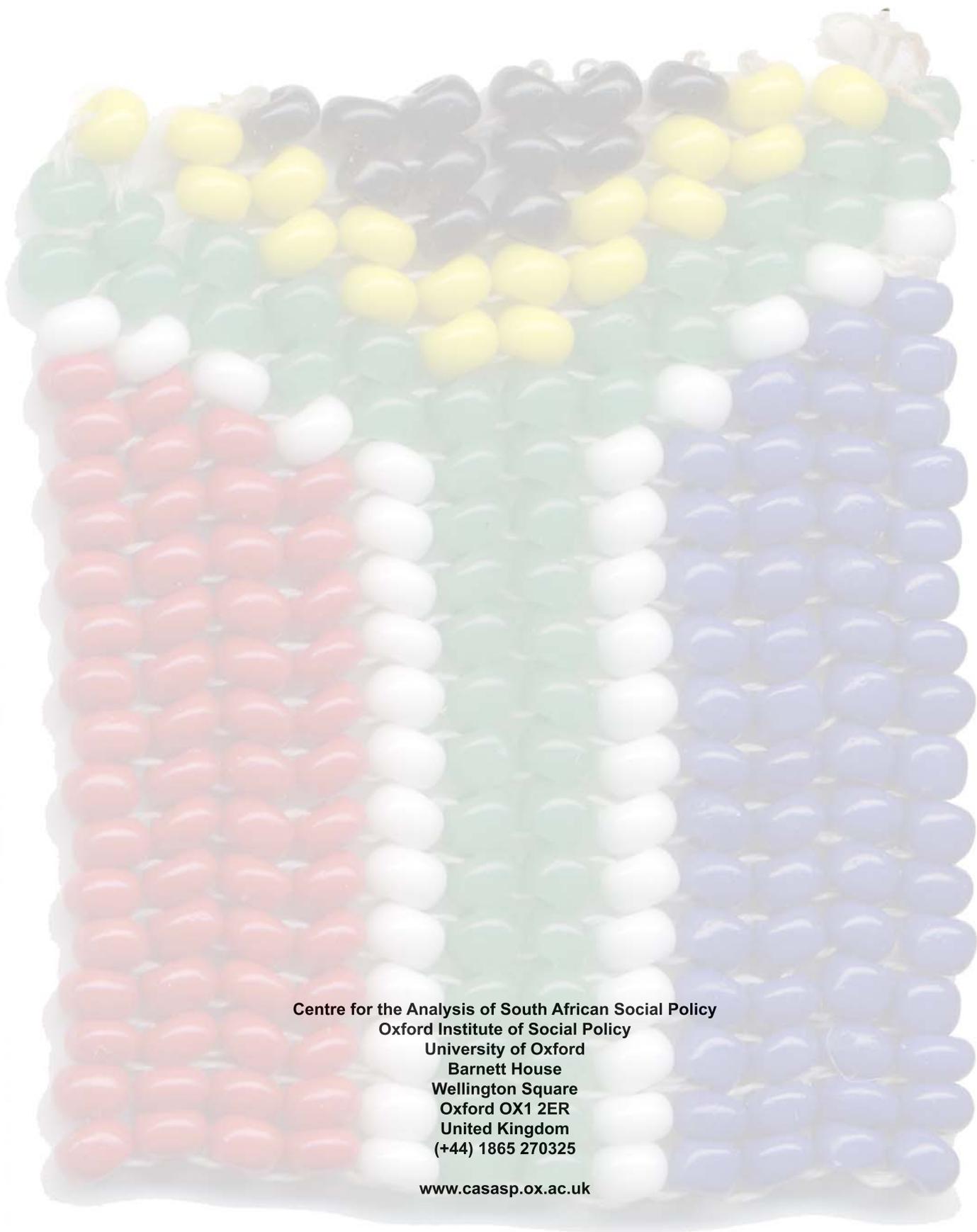
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