

Sources of Official Poverty Data: Reflections on Sixty Years of the Production of Statistics on Poverty in Zambia, 1964-2024

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Abstract

This article explores the evolution of official statistics on poverty in Zambia during the first sixty years of independence. Using various government reports and oral sources, it analyses the sources of data on poverty and how they shaped the understanding of the phenomenon. It demonstrates that up to the late 1980s, the sources of poverty-related data were household budget surveys whose emphasis was on data required for computing national income indices. Therefore, data on poverty from these sources were incomprehensive. However, with the economic decline and the negative effects of Structural Adjustment, the collection of data on poverty increased significantly from the 1990s. More regular and comprehensive multidimensional surveys were undertaken, which emphasised the living conditions of the people rather than income indices. This resulted in more comprehensive data on living conditions and a better understanding of the poverty situation. The data informed the efforts made by government and other stakeholders to combat poverty in Zambia.

Key Words: poverty, poverty data, household surveys, priority surveys, living conditions, Zambia

Introduction

Poverty is a multidimensional concept that has undergone significant changes in terms of the way it has been defined and measured globally. Various concepts and tools have been formulated by scholars and other stakeholders and used to assess poverty. The definition and measurement of poverty has evolved from the exclusive use of money metrics to the use of social indicators that include deprivation of a person or household of the essentials of wellbeing.¹ Indicators of deprivation include income, food, housing, water, health, education, and so on. The changes in the definition and measurement of poverty have largely been shaped by international frameworks and attempts to adapt them to local environments. Therefore, the sources of data with which to assess poverty have also evolved under the influence of global and local dynamics.²

¹ For details, see 'Definitions and measures of poverty', *Development Initiatives*, July 2016, www.devinit.org, accessed on 12 June 2024.

² Mbozi Santebe, 'A History of the Production of Statistics in Zambia, 1939-2018', PhD Thesis, University of the Free State, 2021, 2-4.

These developments are well mirrored by the evolution of data on poverty in Zambia and other developing countries.

The compilation of data relating to poverty in Southern and Central Africa was started in the colonial period by anthropologists, sociologists and economists, as well as government statistical offices. Scholars collected data on household budgets and used them to compute the Poverty Datum Line (PDL), a technique used to estimate 'the cost of the minimum theoretical needs for a household to maintain decent and health survival under short-term conditions.'³ It was first developed by Seebohm Rowntree in England in the late nineteenth century who used it to assess poverty in York. A.L. Bowley and A.R. Burnett-Hurst then modified the PDL in 1915, after which it was adopted and used in other countries to assess poverty.⁴ The PDL method first took into account requirements for food, clothing, cleansing materials, and fuel and lighting, 'bearing in mind the varying needs of persons of different ages and sexes.'⁵ The primary PDL was calculated by totalling the costs for food and clothing for each individual and adding the total cost of the household needs for fuel and lighting. The secondary PDL was then determined by adding the cost of rent and the worker's transport to and from work.⁶ Since the inception of the PDL, most authorities have regarded it as 'the best method available for assessing the socio-economic status and level of a household.'⁷ Therefore, the PDL and its subsequent variants have continued to be utilised for assessing household poverty.

Works on the PDL in Southern Africa were first done by Edward Batson, Professor of Sociology at the University of Cape Town, who used it to assess poverty among Africans in Cape Town, South Africa.⁸ In the early 1940s, Batson extended his studies to Salisbury in Southern Rhodesia where he held household budget studies and estimated the PDL of Africans. The studies showed that many Africans lived below the PDL and that their household incomes were insufficient to afford the minimum requirements for health and decency. After the Second World War, the South African Council for Scientific and Industrial Research held poverty surveys to assess the rent-paying ability of Africans in urban areas. These were done 'in close collaboration with Batson and especially used his methods.'⁹ Besides, the South African Institute of Race

³ H.L. Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa* (Durban: University of Natal Institute for Social Research, 1966), 1.

⁴ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, 1.

⁵ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, ii.

⁶ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, ii.

⁷ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, 1.

⁸ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, 1.

⁹ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, 2.

Relations from time to time issued pamphlets on the African cost of living in the Soweto complex of townships in Johannesburg using methods that were along the line of Batson's work.¹⁰

In Central Africa, it was the Rhodes – Livingstone Institute that spurred poverty-related research on Africans. Anthropologists affiliated to the Institute conducted budget studies and collected poverty-related data on Africans in urban areas. In the 1950s, these anthropologists adopted the PDL method and applied it on Africans living in urban areas. Worth noting was the work of D.G. Bettison who conducted household surveys of Africans in urban areas of Northern Rhodesia and Nyasaland.¹¹ At the request of the Northern Rhodesia African Housing Board, Bettison held social surveys among Africans in selected urban areas of Lusaka in 1957 and estimated their Poverty Datum Line.¹² He later did a similar study in Blantyre in Nyasaland. Like studies in South Africa and Southern Rhodesia, the two surveys indicated that most Africans in urban areas lived below the PDL. Their incomes were inadequate for their households to maintain the requirements for minimum decency and health.¹³

Meanwhile, the Central Statistical Office of the Federation of Rhodesia and Nyasaland, based in Salisbury, also held household budget surveys of Africans in urban areas of Northern Rhodesia in 1953 and 1960 and compiled data on their cost of living.¹⁴ Their datasets usually contradicted those of the anthropologists, showing that Africans were prospering. Data produced by the statistical office was mainly used to compile figures on national income, including the contribution of Africans to the Gross Domestic Product (GDP) and its derivatives. At the time, GDP per capita was highly considered as an indication of the wellbeing of the citizens. However, it obfuscated the inequalities that existed in the country.

There have been some historical studies on poverty in Southern and Central Africa just as elsewhere in Africa. Among the most popular are the works of scholars who contributed to the book partly titled *The Roots of Rural Poverty in Central and Southern Africa*, edited by Robin Palmer and Neil Parsons, which examines poverty in the rural areas of the region from a Marxist perspective.¹⁵ They trace the roots of rural poverty to colonial policies such as land alienation,

¹⁰ Watt, *The Poverty Datum Line in Three Cities and Four Towns in South Africa*, 2.

¹¹ D.G. Bettison, 'The Poverty Datum Line in Central Africa: Comparative Material from Northern Rhodesia, Southern Rhodesia and Nyasaland', *Rhodes – Livingstone Journal*, 27 (1960), 4. For details on the survey held in Lusaka, see Santebe, 'A History of the Production of Statistics in Zambia', 108-110.

¹² Santebe, 'A History of the Production of Statistics in Zambia', 108-110.

¹³ Bettison, 'The Poverty Datum Line in Central Africa', 4. See also, Santebe, 'A History of the Production of Statistics in Zambia', 108-110.

¹⁴ Santebe, 'A History of the Production of Statistics in Zambia', 104-114.

¹⁵ These include Robin Palmer, 'The Agricultural History of Rhodesia', in Robin Palmer and Neil Parsons (eds.), *The Roots of Rural Poverty in Central and Southern Africa* (Berkeley and Los Angeles: University of California Press, 1977), 221-254; Ian Phimister, 'Peasant Production in Southern Rhodesia, 1890-1914, with Particular Reference to

African taxation, unfair marketing policies, creation of native reserves and forced labour, all of which benefited the colonial enterprise and led to underdevelopment in rural areas.¹⁶ This underdevelopment was sustained in the postcolonial period as the region remained part of the capitalist world which continued to thwart the aspirations of the people towards progressive development.¹⁷ Although the collection provides crucial insights on the roots of rural poverty, the contributors paid no attention to sources of poverty data.

Also insightful is the edited book containing contributions of various scholars on the Poverty Reduction Strategy Paper (PRSP) in Zambia.¹⁸ The contributors explain how the PRSP was formulated and introduced, with commentaries on its potential to reduce poverty. Some of the studies expressed pessimism over the viability of the PRSP towards poverty reduction. They view the programme as having been ineffective partly because the PRSP was in practice tilted towards achieving economic growth rather than reducing poverty.¹⁹ Chrispin Matenga makes this argument in relation to programmes in the tourism sector while Derrick Elemu argues that the mainstreaming of gender was ineffective at grassroots level due to lack of appropriate structures at district and community levels.²⁰ This collection is informative on the shortcomings of the PRSP

Victoria District', in Robin Palmer and Neil Parsons (eds.), *The Roots of Rural Poverty in Central and Southern Africa* (Berkeley and Los Angeles: University of California Press, 1977), 255-267; Maud Muntimba, 'Thwarted Development: A Case Study of Economic Change in the Kabwe Rural District of Zambia, 1902-1970', in Robin Palmer and Neil Parsons (eds.), *The Roots of Rural Poverty in Central and Southern Africa* (Berkeley and Los Angeles: University of California Press, 1977), 345-364; and Laurel Van Horn, 'The Agricultural History of Barotseland, 1890-1964', in Robin Palmer and Neil Parsons (eds.), *The Roots of Rural Poverty in Central and Southern Africa* (Berkeley and Los Angeles: University of California Press, 1977), 144-169.

¹⁶ Ann Seidman, 'Postscript: The Economies of Eliminating Poverty', in Robin Palmer and Neil Parsons (eds.), *The Roots of Rural Poverty in Central and Southern Africa* (Berkeley and Los Angeles: University of California Press, 1977), 412-413; and Palmer, 'The Agricultural History of Rhodesia', 227-238.

¹⁷ Muntimba, 'Thwarted Development', 361.

¹⁸ See, among others, Peter Meyns, 'Achieving Poverty Reduction – Can Zambia's Political System Deliver the Goods?' in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap? The PRS Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 29-56; Walter Eberlei, 'Donor Politics in Zambia: Promoting Poverty Reduction or Fueling Neopatrimonialism', in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap? The PRS Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 89-115; Venkatesh Seshamani, 'The Same Old Wine in the Same Old Bottle? Content, Process and Conditionalities of the Poverty Reduction Strategy', in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap? The PRS Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 117-137; and Bruce L. Imboela, 'Implementing the PRSP in Agriculture – The Fertiliser Support Programme and Poverty Reduction in Kaoma District', in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap? The PRS Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 169-188.

¹⁹ See, for example, Chrispin R. Matenga, 'Pro-poor Tourism in Zambia: Conceptual Reality', in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap: The PRS Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 190.

²⁰ Matenga, 'Pro-poor Tourism in Zambia', 180-211; and Derrick Elemu, 'Localising Gender Mainstreaming in the PRS Process: A View from Luanshya District', in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap: The PRS Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 214-243.

in Zambia but lacks information on sources of data used to assess the programme and how they contributed to understanding the poverty situation.

Another work focusing on poverty in Zambia is that of Kristi Mahrt and Gibson Masumbu who analyse multidimensional poverty in Zambia from 1996 to 2010.²¹ They note that the country made progress towards national development and improvement of multidimensional rural welfare 'driven by small-scale farm and non-agricultural households.'²² However, they conclude that in comparison to urban households, rural households, particularly in the small-scale farm sector, continued to lag behind.²³ Although they refer to some sources of poverty data, the authors are not concerned with how these developed over time in the manner that this article as they only make occasional reference to sources of poverty statistics.

From the foregoing, this article explores the evolution of sources of data on poverty in Zambia during the first sixty years of independence and how they shaped the understanding of poverty in the country. The article demonstrates that during the development decade, Zambia concentrated on collecting data on national economic growth.²⁴ Thus, the main source of poverty-related data, the Household Budget Surveys, mainly gathered data required for national income indices. As a result, data on poverty from these sources were limited and incomprehensive. This persisted until the late 1970s and the 1980s, when the surveys began to collect data on social indicators and exposed the poverty situation and inequalities.²⁵

The article also argues that with the economic decline and the negative effects of the Structural Adjustment Programme, collection of poverty data was stepped up in the early 1990s using the Social Dimensions of Adjustment Priority Surveys. These were transformed into the multidimensional Living Conditions Monitoring Surveys held more regularly between 1996 and 2024. The surveys emphasised data on the living conditions of the people. Consequently, there was more comprehensive data on poverty and a better understanding of the phenomenon, which informed the efforts made by government and other stakeholders to combat poverty.

²¹ Kristi Mahrt and Gibson Masumbu, 'Estimating Multidimensional Poverty in Zambia', in Channing Arndt and Finn Tarp (eds.), *Measuring Poverty and Wellbeing in Developing Countries* (Oxford: Oxford University Press, 2017), 1-46.

²² Mahrt and Masumbu, 'Estimating Multidimensional Poverty in Zambia', 1.

²³ Mahrt and Masumbu, 'Estimating Multidimensional Poverty in Zambia', 1.

²⁴ See Republic of Zambia, *Urban Household Budget Survey in Low Cost Areas, 1966-1968* (Lusaka: Central Statistical Office, 1973), i.

²⁵ Morris David Morris, *Measuring the Conditions of the World's Poor: The Physical Quality of Life Index* (New York: Pergamon Press Inc., 1977), xi.

Poverty Data during the Development Decade, 1964-1974

Zambia has since independence in 1964 pursued national development in line with global trends. In the decade up to the mid-1970s, the development decade, the emphasis globally was on growth-oriented development strategies that stressed national economic growth.²⁶ This emphasis was mainly due to the conviction that national economic growth would translate into improvement of the livelihoods of the people and end poverty. Caesar Cheelo, Marja Hinfelaar and Manenga Ndulo observe that in the 'post-independence decades, policy makers believed that high levels of growth on their own would eventually eliminate poverty'²⁷ As a result, the emphasis globally was on collecting data for assessing national economic growth. This was replicated in Zambia's statistical arena and most data were tailored towards computing national growth indicators.

The main source of data relating to poverty was the urban Household Budget Survey, which was held primarily to generate statistics on household income and expenditure. Data on income were used for computing national economic growth indicators, particularly the contribution of the household sector to national income.²⁸ The Household Budget Survey also provided data that were used for computing the cost of living index, which was the main indicator relating to poverty. The data also indicated the extent to which people could afford the necessities of life and were essential in planning and implementing development programmes.²⁹

Between 1966 and 1974, the Central Statistical Office (CSO), now ZamStats, held Household Budget Surveys to yield baseline data on income and expenditure patterns of households in various towns.³⁰ The report of the surveys for 1966-1968 indicates that the 'objectives of this survey were to compile consumer price indexes and revise them, if necessary, in accordance with shifts in consumption pattern of goods and services, to improve national income estimates and determine demand for various items.'³¹ The data from the survey showed 'changes in the prices of goods and services entering into the household budgets of families with incomes of K60 and below per month.'³² These were considered to be the lower income group while the higher income group comprised households whose monthly incomes were at least K160.

²⁶ Morris, *Measuring Conditions of the World's Poor*, 1.

²⁷ Caesar Cheelo, Marja Hinfelaar and Manenga Ndulo, *The Developmental State in Zambia: Plausibility, Challenges, and Lessons from South Korea* (Ithaca: Cornell University Institute for African Development, 2020), 100.

²⁸ Republic of Zambia, *Urban Household Budget Survey in Low Cost Areas, 1966-1968*, i.

²⁹ See for example, Republic of Zambia, *Urban Household Budget Survey in Low Cost Areas, 1966-1968*, i.

³⁰ Republic of Zambia, *Urban Household Budget Survey in Low Cost Areas, 1966-1968*, i. The survey was conducted in Lusaka, Kitwe, Kabwe, Ndola, Luanshya, Choma, Livingstone, Chipata and Mongu. NAZ MF 1/3/242 Director of CSO to Permanent Secretary of the Ministry of Finance, 20 January 1967.

³¹ Republic of Zambia, *Urban Household Budget Survey in Low Cost Areas, 1966-1968*, i.

³² Republic of Zambia, *Department of Census and Statistics Annual Report for 1970* (Lusaka: CSO, 1972), 6.

The data reflected changes in the prices of goods and services consumed by the lower and upper income groups, respectively.³³ The two datasets provided the basic indicators for assessing changes in the prices of commodities.

However, household data demonstrated during the development decade that economic growth alone was insufficient to fight poverty. Despite high growth levels that some countries recorded, they continued experiencing widespread poverty. As Walter Eberlei, Peter Meyns and Fred Mutesa argue, the belief in the trickle-down effect of massive capital transfers and investments on development and poverty reduction was effectively challenged.³⁴ There was growing concern over the inability of national income data to highlight people's living conditions. For example, despite Zambia's growing national wealth, the living conditions of many people remained poor. Thus, in the late 1970s, development strategies began to shift 'toward assuming more effective address of essential human needs while increasing the output of goods.'³⁵ Efforts were made to formulate indicators for measuring progress in physical well-being more effectively than was done using gross national product and other monetary indicators.

The debate that ensued on alternative measures for reducing poverty gave rise to the concept of basic needs in the 1970s. Morris notes that in the 1970s, there was growing interest in meeting the minimum needs of the world's poor on an increased scale.³⁶ Consequently, new development strategies of the 1970s sought to pursue equity and not just growth. Development planners began to directly pursue projects that stressed distribution of benefits.³⁷ The World Bank and other donors re-focused their development strategy and adopted an income-generating approach whose aim was to develop measures for increasing the productivity of the rural poor and supplementing investment in basic social services.³⁸

With the new development strategies, Household Budget Surveys were expanded in order to collect more data required for assessing income inequalities and combating poverty. Therefore, in 1974-1976, the CSO conducted a longitudinal Household Budget Survey covering urban, peri-urban and rural households, the first of its kind since its predecessors had been restricted to urban areas.³⁹ Besides collecting data on income, consumption and expenditure, the survey also

³³ Republic of Zambia, *Department of Census and Statistics Annual Report, 1970*, 7.

³⁴ Walter Eberlei, Peter Meyns and Fred Mutesa, 'Introduction', in Walter Eberlei, Peter Meyns and Fred Mutesa (eds.), *Poverty Reduction in a Political Trap? The PRSP Process and Neopatrimonialism in Zambia* (Lusaka: UNZA Press, 2005), 2.

³⁵ Morris, *Measuring Conditions of the World's Poor*, xi.

³⁶ Morris, *Measuring Conditions of the World's Poor*, 1.

³⁷ Morris, *Measuring Conditions of the World's Poor*, 3.

³⁸ Eberlei, Meyns and Mutesa, 'Introduction', 4.

³⁹ Mpfya S.C. Mulenga, 'Zambia', *Population Size in African Countries* (Paris: Groupe de Demographie Africaine, 1986), 344; and Republic of Zambia, *Department of Census and Statistics Annual Report for 1974* (Lusaka: CSO,

gathered data on wages, prices, housing and rent, as they also had a bearing on the livelihoods of the people.⁴⁰ The inclusion of rural areas reflected the desire of the government to assess rural development schemes and their contribution to combatting rural poverty and urbanisation.

Economic Decline versus the Development of Poverty Data, 1975-1990

The decline of the economy from the mid-1970s had a telling impact on the livelihoods of many Zambians. The energy crisis of 1973 resulted in high prices of oil which were accompanied by the fall in copper prices, which spelt disaster on the economy as it led to drastic increases in import expenditure amidst the declining export revenue.⁴¹ Zambia soon began to borrow heavily from international lenders to finance social sector spending such as education and health. Thus, the country degenerated into a debt crisis which in the 1980s crippled its ability to finance planned development programmes.⁴² The persistent economic crisis and the state's on-and-off adoption of the Structural Adjustment Programme led to serious challenges for many people while the debt crisis weakened the state's ability to combat poverty. All through the 1980s, many people in Zambia faced severe economic challenges and had difficulties to sustain their livelihoods.

The above challenges necessitated the collection of more data with which to assess and combat the impact of the economic decline. Therefore, the compilation of price indices was sustained because of their importance in assessing the livelihood of the people. As pointed out by David Mort, 'price changes have a major impact on the economic well-being of all economic players; consumers, companies, governments, and others.'⁴³ In order to sustain the price data, the CSO held Household Budget Surveys in the 1980s to yield data for price indices. It also expanded the data on consumer prices, wholesale prices and prices of durable goods.⁴⁴ Some of the data were collected as part of Zambia's participation in the International Comparison Programme that investigated price changes and purchasing power in a number of countries.⁴⁵

In the 1980s, there were increasing concerns that governments were failing to meet the needs of the majority of the citizens. In the meantime, the growing realisation that national income metrics were not adequately accounting for the conditions of the people spurred a shift to the assessment of people's livelihoods using social indicators such as life expectancy, infant mortality

1976), 2. The towns of Kitwe, Chingola and Kabwe were selected as urban areas while Kafue and Kapiri Mposhi were selected as semi-urban areas. See Republic of Zambia, *Department of Census and Statistics Annual Report for 1975* (Lusaka: CSO, 1977), 24.

⁴⁰ Republic of Zambia, *Department of Census and Statistics Annual Reports, 1976-1979* (Lusaka: CSO, 1980), 3.

⁴¹ See, for example, Republic of Zambia, *Third National Development Plan, 1979-1983* (Lusaka: National Commission for Development Planning, 1979), iii, 5 & 18.

⁴² Republic of Zambia, *Third National Development Plan*, 41.

⁴³ David Mort, *Understanding Statistics and Market Research Data* (London: Europa Publications, 2003), 37.

⁴⁴ Republic of Zambia, *Department of Census and Statistics Annual Report for 1975*, 24.

⁴⁵ Republic of Zambia, *Department of Census and Statistics Annual Report for 1981* (Lusaka: CSO, 1983), 8.

and literacy, which exposed people's living conditions.⁴⁶ Besides, the 1980s saw the commencement of the use of social indicators to compute national income under the auspices of the United Nations. The new metrics also emphasised the understanding of living conditions of people in a country. Zambia was one of the countries where the use of social indicators was tested. Therefore, it undertook a socio-economic survey in 1982 and generated data on various socio-economic subjects such as mortality, health, nutrition and education.⁴⁷ The datasets were used to assess poverty and compute social indicators for national income purposes.

The United Nations Economic Commission for Africa also promoted the National Household Survey Capability Programme to improve data on households in Africa. A number of countries participated in the programme. As part of this programme, Kenya held Household Budget Surveys in the ten years up to 1984 while Zambia undertook the 1981-1983 longitudinal Household Budget Survey.⁴⁸ Held in Lusaka, Ndola and Kitwe, the survey collected data on changes in income and expenditure which were used to prepare consumer price indices from 1985 onwards and to assess and monitor the effects of the monthly inflation on the livelihood of the people.⁴⁹ Using the indices, the CSO found out that there was a rapid rise in inflation during the late 1980s, which severely affected the livelihoods of many Zambians.

In view of the drastic price increases and the deteriorating living conditions, the government introduced a mealie meal coupon system in 1989. Through the scheme, people considered to be the poorest in urban areas were to be identified and given coupons for free mealie meal.⁵⁰ On paper, the scheme was intended to support people in the low income group to buy mealie meal at a subsidised price to cushion them against the brunt of the ongoing economic crisis. In practice, the mealie meal coupon scheme was abused by politicians in the United National Independence Party as a tool for appeasing the general populace and sustaining their hold on power. However, the party lost the subsequent elections in 1991 to the Movement for

⁴⁶ Morris, *Measuring Conditions of the World's Poor*, xi.

⁴⁷ Republic of Zambia, *Selected Socio-economic Indicators 1992* (Lusaka: CSO, 1992); and National Commission for Development Planning, 'Country Statement on Socio-economic and Demographic Indicators on Zambia, 1984', Paper presented at the Second African Population Conference, Arusha, 9-14 January 1984.

⁴⁸ Ben Kiregyera, 'Some Sources of Non-sampling Errors in African Census and Survey Work: A Review', *International Statistical Review*, 50, 3 (1982), 312-313.

⁴⁹ Ben Kiregyera and J.P. Banda, 'Challenges of a Central Statistical Office in a Developing Economy: The Case of Zambia', *Journal of Official Statistics*, 2, 1 (1986), 37; and Republic of Zambia, *Department of Census and Statistics Annual Report for 1983* (Lusaka: CSO, 1985), 9.

⁵⁰ Friday Mulenga, 'Crises of Expectations: Workers Struggles in Zambia, 1964-2011', PhD Thesis, University of Zambia, 2017, 136.

Multi-Party Democracy which then discontinued the coupon scheme as it was costly, inefficient and ineffective.⁵¹

Structural Adjustment Programme and the development of Poverty Data, 1991-1999

With the ascension to power of President Frederick Chiluba and the Movement for Multi-Party Democracy in 1991, Zambia switched to liberal policies and drastically adopted the Structural Adjustment Programme. The programme involved both fiscal and monetary reforms which sought to redress imbalances in the economy. The fiscal policies included tax reform and reduction in government expenditure while monetary reforms involved reducing the money supply and liberalising interest rates and foreign exchange rates.⁵² It also included liberalisation of trade, privatisation of state owned companies, removal of subsidies on consumption and production, and restructuring of the civil service.⁵³ The measures exacerbated poverty as rapid privatisation of the economy threw many people out of employment and relegated them to the ranks of the suffering masses.

Consequently, Zambia engaged in conducting the Social Dimensions of Adjustment Surveys in the early 1990s.⁵⁴ Miniva Chibuye explains that Zambia commenced Priority Surveys in 1991 under the support of the World Bank, African Development Bank and other development partners to collect data on the effects of Structural Adjustment on different segments of the population.⁵⁵ Hence, the trajectory of sources of poverty data continued to be influenced by external forces. The CSO indicates that the primary aim of Priority Surveys was to collect data for assessing 'the socio-economic effects of structural adjustment policies [and] how such policies affect living standards at the household level.'⁵⁶ In this regard, Priority Surveys aimed to provide a means for identifying policy target groups, namely, the poor and most vulnerable sections of the population. They were also intended to provide key socio-economic variables 'to describe and monitor the wellbeing of different kinds of households.'⁵⁷ Thus, they stressed five basic needs indicators, namely, education, health, nutrition, food expenditure and housing.

Zambia's Priority Surveys were undertaken in 1991 and 1993 respectively. The surveys were household based and they were held on a sample basis covering the whole country including

⁵¹ Mulenga, 'Crises of Expectations', 136.

⁵² Republic of Zambia, *Social Dimensions of Adjustment: Priority Survey II 1993 Report* (Lusaka: CSO, 1994), 1.

⁵³ Republic of Zambia, *Priority Survey II*, 1.

⁵⁴ Republic of Zambia, *Social Dimensions of Adjustment: Priority Survey I 1991 Report* (Lusaka: Central Statistical Office, 1993).

⁵⁵ Miniva Chibuye, 'Interrogating Urban Poverty: The Case of Zambia', Report for the International Institute for Environment and Development, 2011, <https://www.jstor.com/stable/resrep01279.4>, accessed on 7 May 2024.

⁵⁶ Republic of Zambia, *Priority Survey II*, 1.

⁵⁷ Republic of Zambia, *Priority Survey II*, 1.

both rural and urban areas.⁵⁸ They were multi-dimensional, covering a wide range of subjects which allowed deep analysis at both national and provincial levels. Substantial data were collected on the people's socio-economic welfare, particularly on 'health care, education, labour-force supply, household income and assets, household expenditures, poverty, and household amenities and facilities.'⁵⁹ The surveys provided the most detailed poverty data compared to earlier surveys and this helped to deepen the understanding of the extent of poverty in Zambia.

Priority Surveys categorised households and persons in Zambia as being non-poor, moderately poor or extremely poor using the total income that accrued to the households in which they were members.⁶⁰ Income continued to be used in calculations of poverty because it determined the ability of households to purchase goods and services. However, it was observed that while urban households mostly relied on cash income for their livelihoods, rural households depended on own production of food but used cash income to purchase other goods and services.⁶¹ The surveys determined a Poverty Line and used it to distinguish the poor from non-poor. A poverty line was defined as 'the level of income or expenditure which separates the poor and the non-poor individuals at the time of the survey.'⁶² It was assumed that poverty existed when individuals or households were unable to acquire a specific level of consumption of both food and other basic needs, such as some quality of housing, sanitation and water supply.⁶³ Therefore, the surveys used the food basket approach, which involved calculating the cost of acquiring basic food items that provided minimum calories required by an individual or household. All specific food nutritional requirements were satisfied at or above this level of income, but not satisfied if actual income fell short of this figure.⁶⁴

The Priority Surveys reflected the poverty headcount and compared the extent of poverty among different sections of the population such as urban/rural households and female-headed/male-headed households. In 1991, 29 percent of all people were non-poor, 10 percent were moderately poor and 61 percent extremely poor.⁶⁵ Similarly, in 1993, it was reported that '76 percent of all persons living in Zambia are extremely poor, 8 percent are moderately poor and only 16 percent are not poor.'⁶⁶ Comparison between rural and urban areas revealed that in 1991,

⁵⁸ Republic of Zambia, *Priority Survey II*, i.

⁵⁹ Chibuye, 'Interrogating Urban Poverty', 3.

⁶⁰ Republic of Zambia, *Priority Survey I*, 129.

⁶¹ Republic of Zambia, *Priority Survey II*, 109.

⁶² Republic of Zambia, *Priority Survey I*, 129.

⁶³ Republic of Zambia, *Priority Survey I*, 129.

⁶⁴ Republic of Zambia, *Priority Survey I*, 130.

⁶⁵ Republic of Zambia, *Priority Survey I*, 131.

⁶⁶ Republic of Zambia, *Priority Survey I*, 129; and Republic of Zambia, *Priority Survey II*, 109.

78 percent of people in rural areas were extremely poor as compared to 44 percent in urban areas while only 15 percent were non-poor in rural areas as compared to 45 percent in urban areas. In 1993, 89 percent of persons in rural areas were extremely poor compared to 56 percent in urban areas while 8 percent were non-poor in rural areas compared to 30 percent in urban areas.⁶⁷

Poverty data were analysed according to provinces. Urban provinces had the highest proportions of non-poor persons and the lowest proportions of extremely poor persons, with the opposite being the case for rural provinces. In 1991, Lusaka Province had the highest proportion of non-poor persons at 57 percent followed by Copperbelt with 35 percent.⁶⁸ Northern and Western provinces had the highest proportions of extremely poor persons, almost 80 percent each. In 1993, Lusaka Province had the highest proportion of non-poor persons at 34 percent followed by Copperbelt with 25 percent while Western and North Western Provinces had the highest proportions of extreme poverty at about 90 percent each.⁶⁹ The proportion of the non-poor population was also much higher in urban than in rural areas in each province. There were also data on the distribution of poverty levels according to the age of the household head and the gender of the household head. It was observed that the younger the age of the household head, the less poor the household was, with the age group of 20-29 years having the highest proportion of non-poor persons and the age group of 50 years and above having the least.⁷⁰ In addition, female headed households had a higher proportion of extreme poverty at 80 percent compared to that of male headed households at 72 percent. Furthermore, small-scale farming households had the highest proportion of extremely poor households at 90 percent which indicated that they were worse off than other socio-economic groups.⁷¹

Evidently, Priority Surveys provided a more robust analysis and understanding of poverty than did the earlier sources of data. They unveiled the inequalities which national income data could not reveal in the period before the 1990s. The rural-urban poverty inequality in particular can be attributed to the skewed development trends. Development occurred mainly in urban areas at the expense of rural areas that remained undeveloped. For several decades, development in Zambia was concentrated in Lusaka, the Copperbelt and other areas along the line of rail.⁷² Areas away from the line of rail experienced little economic activity and their household incomes remained among the lowest in the country. High poverty levels further forced many males to

⁶⁷ Republic of Zambia, *Priority Survey I*, 131; and Republic of Zambia, *Priority Survey II*, 112.

⁶⁸ Republic of Zambia, *Priority Survey I*, 131.

⁶⁹ Republic of Zambia, *Priority Survey II*, 112.

⁷⁰ Republic of Zambia, *Priority Survey II*, 112.

⁷¹ Republic of Zambia, *Priority Survey II*, 113.

⁷² Cheelo, Hinfelaar and Ndulo, *The Developmental State in Zambia*, 99.

migrate to urban areas in boom years in search of employment, further leaving their rural homes desolate and poorer.⁷³ The Priority Surveys remain the main source of data on poverty in Zambia for the early 1990s. It should be noted that the incidence of poverty peaked in 1994 with 74 percent of the population living below the poverty line before declining in the second half of the 1990s and later on in the 2000s as a result of improved economic performance.⁷⁴

As a result of widespread poverty and suffering noted from the Priority Surveys held in the early 1990s, there was a shift in the conception of poverty from a unidimensional way assessed using a money metric to its multidimensional nature that included multiple modes of deprivation of necessities of wellbeing.⁷⁵ Before this broader conceptualisation, the World Bank definition of poverty was measured by a per capita income of less than two dollars a day while extreme poverty was measured by a per capita income of less than one dollar a day.⁷⁶ However, poverty was no longer seen as simply in terms of figures of people falling below such poverty lines but included deprivation of access to health, education, safe water, hygiene sanitation, decent housing, human dignity and human rights.⁷⁷ The international community stressed that an adequate concept of poverty should encompass all the most important sectors in which people were deprived and perceived as incapacitated according to local contexts. The new understanding of poverty, therefore, included aspects of human, economic, political, socio-cultural, protective, gender and environmental dimensions.⁷⁸

With this widened conception of poverty, other ways of assessing poverty were formulated such as the much broader index of deprivation. Therefore, there was need for more robust data regimes with which to assess multidimensional poverty and deal with it. In view of this, there was expanded need for requisite data. This resulted in the transformation of Priority Surveys into the broader Living Conditions Monitoring Surveys (LCMS) which were held in 1996 and 1998, with more focus on living conditions and various elements of deprivation.⁷⁹ One informant explained that the LCMS was designed to collect more elaborate information which the country required to assess multidimensional poverty arising from the negative effects of the Structural Adjustment on

⁷³ Cheelo, Hinfelaar and Ndulo, *The Developmental State in Zambia*, 99.

⁷⁴ Interview, Lovemore Muchindu Zonde, Principal Statistician, Living Conditions Monitoring Branch, Zambia Statistics Agency, Lusaka, 14 August 2019. See also, J.N. Zulu, 'The Living Conditions Monitoring Survey', Paper presented at the Global Forum on Gender Statistics, Accra, 26-28 January 2009, 14.

⁷⁵ Seshamani, 'The Same Old Wine in the Same Old Bottle?', 119.

⁷⁶ Eberlei, Meyns and Mutesa, 'Introduction', 1.

⁷⁷ Seshamani, 'The Same Old Wine in the Same Old Bottle', 119.

⁷⁸ Eberlei, Meyns and Mutesa, 'Introduction', 2.

⁷⁹ Seshamani, 'The Same Old Wine in the Same Old Bottle', 119; and Republic of Zambia, *2015 Living Conditions and Monitoring Survey*, (Lusaka: CSO, 2016), i.

people's welfare.⁸⁰ Its main objective was to monitor and highlight the living conditions of the population of Zambia. In particular, the data were to be used for formulating and assessing the progress of poverty reduction strategies.

Poverty Reduction Efforts versus the Living Conditions Monitoring Surveys, 2000-2024

In the late 1990s, the global community formulated various measures aimed at combating poverty. The most important of them were the Millennium Development Goals (MDGs) and the Poverty Reduction Strategies. The MDGs were worldwide goals that guided the development agenda from the early 2000s up to 2015 globally and many developing countries adopted them in an attempt to improve their people's wellbeing and reduce poverty. The MDGs had a poverty reduction component, which placed the eradication of poverty high on the global agenda.⁸¹ Their primary vision of halving the population living in absolute poverty by 2015 became a strong policy benchmark for both industrialised and developing nations. Zambia began to implement the MDGs in the early 2000s and incorporated them in its development and poverty reduction framework in the period up to 2015.⁸²

Therefore, Zambia pursued the targets set under the MDGs, including the one on halving the population living in extreme poverty. Thus, it took part in the Poverty Reduction Strategy programme, which was implemented under the MDGs framework. Like other developing countries, Zambia formulated the Poverty Reduction Strategy Paper (PRSP) as the weapon for combatting poverty and implemented it during the years 2002-2004.⁸³ The country sought to use the PRSP to reduce its indebtedness and direct resources to poverty alleviation. The PRSP went side by side with the Transitional National Development Plan (TNDP) of 2002-2005, which marked the reintroduction of national development planning in Zambia after a hiatus during Chiluba's administration. The PRSP was developed within a participatory framework, which included consultations with other stakeholders such as government officials, political parties, labour unions, women's groups, the youth, the private sector and academics.⁸⁴

Besides the PRSP, the government and its cooperative partners introduced social safety nets in order to cushion the livelihoods of the poor. This was because social protection was recognised as an important element in the fight against poverty. It was realised that poverty would not disappear unless it was addressed by targeted policies.⁸⁵ Such efforts included government

⁸⁰ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 100.

⁸¹ Eberlei, Meyns and Mutesa, 'Introduction', 3.

⁸² Eberlei, Meyns and Mutesa, 'Introduction', 5.

⁸³ Eberlei, Meyns and Mutesa, 'Introduction', 3.

⁸⁴ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 100.

⁸⁵ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 101.

welfare schemes such as the Social Cash Transfer introduced in 2003 and the Zambia Social Investment Fund started in 2004, both of which were donor funded and aimed at improving the livelihoods of the poor.⁸⁶ Others were the Public Welfare Assistance Scheme, the Food Security Pack, the School Feeding Programme and the Urban Self Help Programme.⁸⁷ There were also programmes initiated by non-governmental organisations and local communities, whose efforts focused on street kids, HIV/AIDS orphans and the old/aged persons.⁸⁸

With the MDGs, the PRSP, the TNDP and social safety nets all in place, data were required to assess their progress. Since the LCMS had already been initiated in 1996 and it was thereafter held regularly, these programmes were monitored and assessed using data from this multipurpose survey.⁸⁹ The survey itself was supported by the World Bank and other co-operative partners who provided Zambia with technical expertise, equipment and funding, and held training workshops for data collectors and other stakeholders.⁹⁰ During the 2015 LCMS, for instance, the World Bank 'provided technical and financial support in data collection using the electronic-based Computer Assisted Personal Interviewing technique and in poverty analysis using the best practice methodology.'⁹¹ Therefore, the external community remained important stakeholders in the development of data on poverty and other aspects in general.

The LCMS continued to be held periodically in the 2000s as it remained the primary source of data on living conditions. The survey classified urban households into high, medium and low density (or income) areas and classified rural households based on their extent of involvement in agriculture; either small or medium or large scale.⁹² It collected a vast array of data, including aspects of poverty that resulted from the broadening of the concept, such as housing, education, migration, labour, health, nutrition, water supply, sanitation, employment and energy used in the household.⁹³ It also gathered data on non-farm enterprises, household assets, as well as food production and consumption. Data on household assets showed the important items that were included in assessing poverty. In 2015, the ten most important ones in their order of importance were mattress, hoe, bed, brazier, cellular phone, axe, radio, television, bicycle and residential

⁸⁶ Interview, Zonde, 14 August 2019. See also, Zulu, 'The Living Conditions Monitoring Survey', 14.

⁸⁷ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 101.

⁸⁸ Zulu, 'The Living Conditions Monitoring Survey', 14.

⁸⁹ Interview, Zonde, 14 August 2019. Zulu, 'The Living Conditions Monitoring Survey', 14.

⁹⁰ Interview, Zonde, 14 August 2019.

⁹¹ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, i.

⁹² Republic of Zambia, *The Non-Farm Informal Sector in Zambia, 2002-2003* (Lusaka: CSO, 2006), 1. During the period under discussion, the survey was held in 2002/2003, 2004, 2006, 2010, 2015 and 2024. See, for example, Republic of Zambia, *2015 Living Conditions and Monitoring Survey*, i.

⁹³ Republic of Zambia, *The Non-Farm Informal Sector in Zambia, 2002-2003*, 1; and Republic of Zambia, *Living Conditions Monitoring Survey Report, 2004* (Lusaka: CSO, 2005), 13-186;

building. The most widely owned asset was a mattress at 76.5 percent, others being hoes, beds and braziers at 74.8 percent, 69.2 percent and 68.1 percent, respectively.⁹⁴ However, the survey continued to compile poverty data according to income indicators because household income remained among the determinants of access to necessities of wellbeing.⁹⁵ Data on household income compared urban and rural areas and on average, the monthly income for households was higher in the former than in the latter.⁹⁶ Similarly, male headed households continued to have higher levels of income compared to female headed households. In 2015, male headed households had an average monthly income of K1,928 as compared to K1,377.60 among female headed households.⁹⁷

As income remained an important element in the measurement of poverty, the poverty line continued to be used to determine the degree of impoverishment. In 2015, for example, the poverty line was valued at K214.42 per adult equivalent and the households and individuals were classified as non-poor, moderately poor or extremely poor.⁹⁸ This helped to analyse the poverty incidence and trends in the country. LCMS reports and the poverty mapping exercise conducted from 2013 to 2014 indicated that the incidence of poverty in Zambia reduced from 62.8 percent in 2006 to 60 percent in 2010 partly due to the interventions made.⁹⁹ Cheelo, Hinfelaar and Ndulo note that from 1993 to 2010, the incidence of extreme poverty declined from 63 percent in 1993 to 42 percent in 2010.¹⁰⁰ The 2015 LCMS report indicates that the proportion of the population living below the poverty line in that year was 54.4 percent.

The LCMS also continued to unveil the disparity in the poverty levels of rural and urban areas in Zambia. The 2015 report indicates that poverty in Zambia remained predominantly a rural phenomenon with the incidence of rural poverty standing at 76.6 percent compared to 23.4 percent in urban areas.¹⁰¹ Cheelo, Hinfelaar and Ndulo observe that in 2015, rural poverty stood at 77 percent while urban poverty was 23 percent and that this disparity was a permanent feature in Zambia's poverty distribution since independence.¹⁰² Furthermore, the 2015 LCMS indicates

⁹⁴ Republic of Zambia, *The Non-Farm Informal Sector in Zambia, 2002-2003*, 10-18; Republic of Zambia, *Living Conditions Monitoring Survey Report for 2004*, 13-186; and Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 1 & 7.

⁹⁵ Eberlei, Meyns and Mutesa, 'Introduction', 2.

⁹⁶ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 7.

⁹⁷ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 7.

⁹⁸ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, vii.

⁹⁹ Alejandro de la Fuente, Andreas Murr and Erica Rascon, 'Mapping Subnational Poverty in Zambia', Report for the World Bank Group, March 2015, 2.

¹⁰⁰ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 102. Also see Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 9.

¹⁰¹ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 9.

¹⁰² Interview, Zonde, 14 August 2019. See also, Zulu, 'The Living Conditions Monitoring Survey', 14.

that rural provinces such as Western and North Western Provinces had higher proportions of the population that were poor as compared to urban provinces like Lusaka and Copperbelt.¹⁰³ This was a legacy of the skewed development that the country experienced since the colonial times which continued throughout the postcolonial period.

Furthermore, the LCMS included gender dynamics in its analysis of poverty as required by the government and development partners. As Elemu explains, the government stressed the need for gendered data to ensure effective gender targeting of poverty reduction programmes.¹⁰⁴ In this regard, the government set up a gender statistical unit at the CSO to coordinate the collection of gendered data in ministries, provinces and other institutions. Hence, some gendered data were compiled. The data showed that during the 2000s, poverty continued to be higher among female-headed households than male-headed households.¹⁰⁵ This trend continued in the 2010s and is aptly captured by the LCMS, which indicated data on levels of poverty by sex of household head. In 2015, the LCMS indicated that the percentage of poor persons in male-headed households was less than that in female-headed households.¹⁰⁶ The major reason for this was that women had lower levels of education than men and so they had lower earnings. Also, women had fewer formal employment opportunities due to their household constraints, including childbearing, and they were the more adversely affected by the HIV/AIDS pandemic than men due to gender-discriminating cultural norms.¹⁰⁷

The LCMS provided data for assessing the progress made in the anti-poverty fight. Data from the 2006 and 2010 LCMS, for example, were used to provide indicators for assessing progress towards the MDGs targets and the Fifth National Development Plan of 2006-2010.¹⁰⁸ In view of data from the LCMS, deliberate steps were taken to alleviate poverty in rural areas and female-headed households. It was noted that in rural areas, poverty was partly due to inability of households there to afford farming inputs.¹⁰⁹ Therefore, the government expanded farmer input support in rural areas and other communities found to be having such households. Yet, over the years, politicians took advantage and used the programme to mobilise political support. Thus, as

¹⁰³ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 9.

¹⁰⁴ Elemu, 'Localising Gender Mainstreaming in PRS Process', 223.

¹⁰⁵ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 102.

¹⁰⁶ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 9.

¹⁰⁷ Cheelo, Hinfelaar and Ndulo, *The Development State in Zambia*, 102.

¹⁰⁸ Fuente, Murr and Rascon, 'Mapping Subnational Poverty in Zambia', 13; and Republic of Zambia, *2022 Living Conditions Monitoring Survey Report* (Lusaka: ZamStats, 2022), 5.

¹⁰⁹ Republic of Zambia, *2015 Living Conditions Monitoring Survey*, 7.

Mahrt and Masumbu postulate, despite the targeted planning and robust growth of the 2000s and 2010s, poverty lines continued to show inequalities in the Zambian population.¹¹⁰

The LCMS also provided baseline data for updating the cost of living index. In this regard, the 2002-2003 LCMS yielded data for updating the weighting system in the years up to 2009.¹¹¹ The consumer price index measured changes in retail prices of a fixed basket of consumed goods and services from one month to another. It was important to assess these changes because they impacted the incidence of poverty and the effectiveness of the anti-poverty efforts made. The index covered both rural and urban areas showing the metropolitan low income, metropolitan high income and non-metropolitan groups to indicate how they were all affected by price changes.¹¹² It should be mentioned that the LCMS was not held in the period between 2015 and 2022. Therefore, the 2015 LCMS provided baseline data for updating the index in that period. It also provided benchmark indicators for the Sustainable Development Goals and the Seventh National Development Plan in the period between 2016 and 2022.¹¹³ Data from the 2022 LCMS were then used to assess the progress made towards the two programmes.

Other Sources of Data Related to Poverty

Apart from the Household Budget Surveys, Priority Surveys and Living Conditions Monitoring Surveys, other official data related to poverty were drawn from the Labour Force Survey and the Employment Enquiry. However, these surveys were restricted mostly to aspects of labour and employment and at times relied on data collected from the major surveys discussed earlier. In addition, the Labour Force Survey and the Employment Enquiry were sometimes not regularly conducted. For example, from 1986, the Labour Force Survey could not be undertaken due to lack of funding and it was only resumed in 2005.¹¹⁴ When it was done, the survey yielded data on the size and characteristics of the labour force, as well as indicators such as labour force participation rate, employment-to-population ratio, employment by occupation and sector, youth unemployment, education attainment, illiteracy, wages and hours of labour.¹¹⁵ These labour-related aspects were important in the anti-poverty effort as employment was viewed as an income earning activity that contributed to improvement of people's living conditions.

¹¹⁰ Mahrt and Masumbu, 'Estimating Multidimensional Poverty in Zambia', 4.

¹¹¹ Republic of Zambia, *The Statistician*, July, 2017, 2.

¹¹² Republic of Zambia, *The Statistician*, June 2018, 2.

¹¹³ Republic of Zambia, *2022 Living Conditions Monitoring Survey*, 5.

¹¹⁴ Interview, Charles Mugala, Copperbelt Regional Statistician, Mpelembe House, Ndola, 13 June 2019. The survey was held in 2005, 2008, 2012, 2014 and 2017. Republic of Zambia, *The Statistician*, June 2018, 13.

¹¹⁵ Republic of Zambia, *The Statistician*, June 2018, 13.

On the enterprises sector, the CSO conducted the Quarterly Employment and Earnings Enquiry from the 2000s. The enquiry covered a panel of the largest firms and a sample of smaller enterprises.¹¹⁶ It covered only the formal sector and reported the number, percentage and earnings of employees that were disaggregated by gender in response to the demand for data on women. The survey also covered government, parastatals and private sectors reporting on redundancies, vacancies and job seekers.¹¹⁷ The datasets were crucial in the light of the massive job losses resulting from privatisation. They showed that privatisation hit the workers hard with employment halts, redundancies and retrenchment. Yet, the enquiry faced problems and its reports were irregular due to inadequate resources. Therefore, whenever a report was published, it included statistics for all the pending quarters and years.¹¹⁸

Also worth noting is data collected by the Jesuit Centre for Theological Reflection (JCTR), a non-governmental institution, from 1991 to 2024 on the cost of the monthly food basket.¹¹⁹ The JCTR used this data to influence policies relating to livelihoods of the Zambian people. Its survey began with Lusaka but was later extended to other towns and later on to selected rural areas.¹²⁰ The basket comprised basic items like mealie meal, eggs, bread, vegetables, cooking oil and soap but was later extended to include non-food essentials like housing, water and electricity to improve its accuracy.¹²¹ The JCTR developed the basket primarily as an advocacy tool to support the plight of the poor in line with its objective to promote economic and social justice. It unveiled the conditions of the poor and urged government to address them. The food basket also provided a window into the food security situation in urban areas through comparison of wages, incomes and costs of food required.¹²² Other stakeholders such as trade unions also referred to the data produced by the JCTR in their assessment of the conditions of the poor.

Conclusion

This article examined the development of sources of data on poverty in Zambia over the sixty years after the attainment of independence. It reflected on the evolution of the sources and nature of data collected on poverty and how they influenced the understanding of the phenomenon. The article demonstrated that the main sources of data on poverty evolved from

¹¹⁶ Interview, Mugala, 13 June 2019; and Republic of Zambia, *Quarterly Employment and Earnings Enquiry: First Half 1995* (Lusaka: CSO, 1995).

¹¹⁷ Republic of Zambia, *Quarterly Employment and Earnings Enquiry: First Half 1995*, 1-11; Republic of Zambia, *Quarterly Employment and Earnings Survey Report 1997-1998* (Lusaka: CSO, 2000), 1-12.

¹¹⁸ Republic of Zambia, *Quarterly Employment and Earnings Enquiry: First Half 1995*, 1-11; Republic of Zambia, *Quarterly Employment and Earnings Survey Report 1997-1998*, 1-12.

¹¹⁹ Chibuye, 'Interrogating Urban Poverty Lines', 1.

¹²⁰ Chibuye, 'Interrogating Urban Poverty Lines', 1.

¹²¹ JCTR, 'The Basic Needs Basket (1991-2001): A Comprehensive Overview', Lusaka, February 2005.

¹²² JCTR, 'The Basic Needs Basket (1991-2001).'

Household Budget Surveys to Social Dimensions of Adjustment Priority Surveys, and then to the Living Conditions Monitoring Surveys. It has argued that during the development decade, Zambia compiled data primarily on economic growth, such as national income metrics. As a result, Household Budget Surveys held in the period emphasised data on income and expenditure with little data on poverty. By the mid-1970s, however, there was a realisation that economic growth alone was insufficient to end poverty and so, from then through the 1980s the state shifted towards collection of data on other aspects related to poverty and inequality. Consequently, there was emphasis on social indicators while income data were disaggregated according to categories that exposed inequalities within the society.

The article also demonstrated that following the effects of the 1980s economic decline, the debt crisis and the 1990s Structural Adjustment Programme, especially the privatisation of the economy, there was widespread suffering and poverty in Zambia. Hence, the collection of poverty data in these epochs emphasised the living conditions of the people. Both the early 1990s Social Dimensions of Adjustment Priority Surveys and the Living Conditions Monitoring Surveys initiated in the mid-1990s concentrated on assessing living conditions and stressed the multidimensional nature of poverty, beyond unidimensional income metrics. While Priority Surveys exposed the negative effects of Structural Adjustment, the LCMS provided data for assessing the poverty reduction programmes undertaken between 2000 and 2024. The surveys provided data on the incidence of poverty disaggregated according to gender, rural/urban, age and economic groups. Thus, the period from the 1990s onwards witnessed a drastic increase in data on poverty, which provided a deeper understanding of the phenomenon by government, civil society and international stakeholders. All in all, the article concludes that the sources of data on poverty, the availability and scope of the data, as well as the understanding of poverty and measures taken to combat it, all changed significantly from 1964 to 2024, due to shifts in the understanding of poverty and ways of assessing it.

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