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## A MEMORANDUM ON RESEARCH IN INCOME AND LEVELS OF LIVING IN THE SOUTH

By

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Professor of Sociology and Rural Life

Publications of the

SOCIAL SCIENCE RESEARCH COUNCIL

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Revision of a memorandum prepared for consideration at the  
Sixth Annual Southern Social Science Research  
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March 7-9, 1940.)

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# A MEMORANDUM ON RESEARCH IN INCOME AND LEVELS OF LIVING IN THE SOUTH\*

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## Introduction

In preparing a memorandum on income and levels of living in the South, one might with equal reason pursue any of several courses: (1) give a theoretical discussion of concepts and a development of their interrelationships; (2) undertake a complete critical review of the literature in the field; (3) attempt a synthesis based on the research studies now in existence; (4) suggest needed types of research in the field and discuss the methods and techniques appropriate to them.

The first alternative might prove interesting, and certainly would provide a basis for discussion since probably few could agree. However, it is doubtful whether anything other than vocal and mental exercise would be derived from it. The second might serve a useful purpose, but would be mainly repetitious since many of the participants in this conference are already acquainted with the literature of the field. The third, in light of the incomparability of the studies, would be an almost impossible task. The fourth doubtless would stimulate discussion and thinking, since the various participants are all more or less interested in research in this field and probably have some rather definite ideas of what research is needed and how it should be done. Since no one of the above alternatives could be accomplished adequately in the space permitted this memorandum, an attempt will be made to combine several in a sketchy fashion in the hope that the interests of all will be sufficiently touched upon to stimulate free discussion and thought. No reference to the purely conceptual aspects of the problem will be attempted further than a simple definition of the terms necessary to the discussion. In place of a review of literature, brief mention will be made of general types of pertinent researches that have been or are being made. This will be supplemented by a bibliography of selected studies dealing with the South. Finally, certain research needs and possible techniques will be suggested.

\* This is a revision of a memorandum prepared by the writer for consideration at the Sixth Annual Southern Social Science Research Conference, Chattanooga, Tennessee, March 7-9, 1940.

## Definition of Terms

### Income

Income may be defined as the commodities and services accruing to a group, a family, or an individual, in any given period of time.<sup>1</sup> It includes all monetary receipts, regardless of their sources, whether from wages, salaries, dividends, or interest, and non-monetary receipts that appear in terms of commodities and services. Since income is difficult to express in other than monetary terms, the usual practice is to impute net monetary values to certain of the more tangible commodities and services that are received without direct monetary payments and to add these values to cash income to obtain the monetary value of the income.<sup>2</sup> These include: (1) Farm produce retained by farm families for consumption; (2) payments in kind to employees; and (3) services of houses occupied by their owners.

Certain other commodities and services that are a part of the total income of a group are omitted from monetary income totals since there appears to be no satisfactory manner of measuring them or of converting them into monetary terms. These include: (1) Unpaid services of family members and neighbors, especially those of the housewife; (2) differences in quality of goods and services that are not reflected in price differences; (3) efficiency with which goods and services are used; (4) services provided by local and national government, i. e., free libraries, parks, health and sanitation services, etc., (strictly speaking, the difference between what they cost a given group in terms of taxes and the value of the services that this group derives from them); (5) psychic income, or the satisfactions derived from production and consumption activities, as well as those derived from living in a particular environment. While these values are not included in most figures on income, no one will deny that they play an important part in the income of all groups. Like monetary income these types of income are not equally distributed throughout the population. To devise methods of measuring and comparing these values is doubtless one of the major research problems in the field of income measurement. Until methods are developed and applied for their measurement, it cannot be said that income measures and comparisons are completely adequate.

<sup>1</sup> This paper will be concerned primarily with family income. For a complete discussion of the concept of income see I. Fisher, *The Nature of Capital and Income*.

<sup>2</sup> "Net monetary values" in that values of commodities and services used in producing them are deducted. See B. Kuznets, *National Income and Capital Formation 1919-1935*, p. 1.

### Level of Living

In the field of family living there has been little agreement in the use of terms. Standard of living, cost of living, level of living, plane of living, and manner of living have been used loosely and often interchangeably. However, to most of us the term "level of living" has come to mean the way that groups actually live in contradistinction to the way they would like to live at some future time (standard of living) or the way certain of us would like to have them live (norm of living). In the discussion that follows the term "level of living" will be used to denote the actual goods and services that a family or group of families consumes in a given period of time.<sup>3</sup> Strictly speaking, levels of living are most properly measured in terms of physical quantities of goods and services of various qualities. Since the reduction of all the goods and services consumed to physical measurement is a most difficult if not an impossible task, and since the resulting summary expression would be without meaning, the common practice is to express levels of living in monetary terms. Further, since the consumption pattern of a family or group of families is determined or limited by such factors as (1) family income, (2) size, age, and sex composition of the family, (3) type of family organization, (4) race and nationality of the family, (5) occupation of the family head, (6) size and type of community in which the family resides, (7) and the physical environment in which the family lives, it is necessary to take these factors into account when measuring levels of living.

Needless to say, the difficulties in measuring accurately the levels of living found in a given region are great. At best, only estimates are possible. Even then the costs in time and money of obtaining the basic data on which to construct estimates are so great that not even the agencies of a rich government can afford surveys that include adequate representation of the major groups in its population.

As a direct result of the difficulties involved in measuring levels of living in the sense defined, other factors believed to be closely related to consumption patterns have been depended on as indicators of, and in some cases have become almost synonymous with, level of living. Income figures, especially wages and total cash income, have been most commonly used. The cash expenditures for a particular disbursement in the budget, such

<sup>3</sup> Williams has defined level of living "as a summary term when comparing the content of one living with another, or with a standard, or when generalizing about the content of living of a group." See F. M. Williams and O. C. Zimmerman, *Studies of Family Living in the United States and Other Countries*, "Introduction," p. 4. W. D. Waite and R. Cassady have used the term "level of consumption" in the sense that level of living is being used in this discussion. See *The Consumer and the Economic Order*, p. 205.

as that for food, or clothing, or advancement, have likewise been employed. Further, material possessions, especially housing and various convenience items, have been used either singly or combined into indexes for the measurement of levels of living.

### Studies of Income in Relation to Levels of Living

While it has long been recognized that the income of a family plays a major part in the determination of its level of living, scientific study of the uses of income for family living purposes is of comparatively recent origin.<sup>4</sup> Ernst Engel in his studies of Belgian workingmen's families was the first to investigate statistically the relationship between income and proportionate expenditures for food and other necessities of life.<sup>5</sup> Though it appears that few students in this country have carefully read his monographs, all have been influenced by the interpretations of his work made first by C. D. Wright<sup>6</sup> and later modified by C. C. Zimmerman.<sup>7</sup> Many studies applying Engel's laws (Wright's version) to the consumption patterns of farm, village, and urban families in the United States have appeared.<sup>8</sup> From these studies a few minor modifications of Wright's generalizations concerning Engel's findings have developed. None of these have fundamentally modified the essence of the original generalizations. In the main the application of Engel's analysis has been somewhat sterile, excepting that it has helped to keep active the interest in the relationship between income and family consumption. This is not to say that the findings have been of no value but rather that most students have been willing to drop the whole matter once this particular analysis has been made.

<sup>4</sup> The theoretical aspects of the relationship between income and level of living are purposely avoided since most participants are acquainted with the usual economic analysis of consumption in terms of utility and other theories. If not see C. C. Zimmerman, *Consumption and Standards of Living*, pp. 33-55.

<sup>5</sup> "Lebenkosten Belgischer Arbeiterfamilien Früher und Jetzt," *Bulletin de l'Institut International de Statistique*, 9:1-124 (1895).

<sup>6</sup> Wright popularized the "laws," which are usually stated as follows: "The greater the income, the smaller the relative percentage of outlay for subsistence; the percentage of outlay for clothing is approximately the same, whatever the income; the percentage of outlay for lodging, or rent, and for fuel and light, is invariably the same, whatever the income; and, as the income increases in amount, the percentage of outlay for 'sundries' becomes greater." See *Sixth Annual Report of the Massachusetts Bureau of Labor*, p. 438.

<sup>7</sup> Zimmerman points out that in no place does Engel set forth or even suggest a series of laws such as Wright attributed to Engel. He then quotes Engel's law as follows: "The proportion of outgo used for food, other things being equal, is the best measure of the material standard of living of a population." See *Consumption and Standards of Living*, pp. 39-43, 96-102, and "Ernst Engel's Law of Expenditures for Food," *The Quarterly Journal of Economics*, 47:78-101 (1932).

<sup>8</sup> See especially F. H. Streighoff, *The Standard of Living Among Industrial People in America*, and W. F. Ogburn, "Analysis of the Standard of Living in the District of Columbia," *Quarterly Publication of the American Statistical Association*, 16:374-389 (1919). For other references, especially to foreign studies, see Zimmerman, *Consumption and Standards of Living*, pp. 39-42.

One of the most promising modifications of this approach is found in the study of family consumption according to income levels or socio-economic classes.<sup>9</sup> The primary purpose of this type of study is to discover (1) the extent to which families of a given income level or socio-economic group tend to follow similar patterns of consumption, and (2) the nature and the extent of the variations in consumption patterns existing between families of different income levels or socio-economic status. Recently a very carefully planned national survey, "The Study of Consumer Purchases," has been undertaken along these lines.<sup>10</sup> This study will provide students of family living with the most complete information ever assembled regarding the uses of income in relation to levels of living.

In addition to studies of the above types, the Le Play studies have bearing on the problem in that they not only provide detailed quantitative data on consumption and income but also focus attention on certain factors in family life that influence the uses of income and consequently the pattern of living of a family. These factors include family organization, adjustment to the community, adjustment of family members to each other, work habits, food habits, and health.<sup>11</sup>

While relatively few intensive studies have been made of the relationship between income and levels of living in the South, many studies contain some analysis of this relationship. O. D. Duncan and J. T. Sanders,<sup>12</sup> in their study of Oklahoma cotton farmers, analyzed expenditures according to Engel's method. Wilson Gee and W. H. Stauffer,<sup>13</sup> W. A. Anderson,<sup>14</sup> Dorothy Dickins,<sup>15</sup> and E. L. Kirkpatrick and E. G. Tough,<sup>16</sup> to mention the authors of a few of the well known studies, have analyzed expenditures with varying degrees of completeness,

<sup>9</sup> See especially Social Science Research Council, *Consumption According to Income*, and A. D. H. Kaplan and others, *Family Income and Expenditure in Selected South-eastern Cities, Vol. II, "Family Expenditures."*

<sup>10</sup> The study is a Works Progress Administration project conducted by the United States Bureau of Home Economics and the United States Bureau of Labor Statistics, in cooperation with the National Resources Committee and the Central Statistical Board. For a discussion of the study see H. Kneeland and others, "Plans for a Study of the Consumption of Goods and Services by American Families," *Journal of the American Statistical Association*, 31:133-140 (1936).

<sup>11</sup> For a complete discussion of the Le Play method see C. C. Zimmerman and M. E. Frampton, *Family and Society*, pp. 73-150. Zimmerman has suggested other analyses emphasizing the sociological aspects of the problem. See "Objectives and Methods in Rural Living Studies," *Journal of Farm Economics*, 9:223-237 (1927); "The Family Budget as a Tool for Sociological Analysis," *American Journal of Sociology*, 33:901-910 (1928); and, *Consumption and Standards of Living*, pp. 561-580.

<sup>12</sup> *A Study of Certain Economic Factors in Relation to Social Life Among Oklahoma Cotton Farmers.*

<sup>13</sup> *Rural and Urban Living Standards in Virginia.*

<sup>14</sup> *Farm Family Living Among White Owner and Tenant Operators; and, Living Conditions Among White Land Owner Operators in Wake County.*

<sup>15</sup> *Family Living on Poorer and Better Soil.*

<sup>16</sup> *Standards of Living in the Village of Crozet, Virginia.*



either according to socio-economic groupings or income levels. Of course, the most complete information on the relation of income to levels of living in the South will be available for the Southeastern states from the Study of Consumer Purchases.<sup>17</sup> The only major study of a Southern group in which the Le Play method has been used was made of Ozark highland families by C. C. Zimmerman and M. E. Frampton.<sup>18</sup>

### Types of Information Available from Studies of Income and Levels of Living in the South

In addition to the rather restricted amount of information obtainable from studies dealing directly with income in relation to levels of living in the South, considerable information is available on income and various aspects of levels of living from studies made in the region. These may be classified for purposes of the present discussion into the following types: studies of income, studies of consumption, studies of housing and home conveniences, and studies of other aspects of levels of living.

#### Studies of Income

In recent years much research interest has been devoted to the study of income on a national basis and many published reports have appeared.<sup>19</sup> In most of these the findings presented have been limited to national estimates of income and its sources. There are, however, several major published studies that give estimates of income, defined and determined in various ways, by states or regions.<sup>20</sup> The information that may be

<sup>17</sup> A. D. H. Kaplan and others, *Family Income and Expenditure in Selected Southeastern Cities*, Vol. II, "Family Expenditures." Similar reports will be available for the small cities and villages as well as for the rural farm population. These will be issued by the Bureau of Home Economics of the United States Department of Agriculture.

<sup>18</sup> *Family and Society*.

<sup>19</sup> See especially: R. F. Martin, *National Income and Its Elements; Idem, Income in Agriculture; Idem, National Income in the United States, 1799-1938*; R. H. Nathan, *National Income, 1929-1935*; C. Warburton, "Value of the National Product and Its Components, 1919-1929," *Journal of the American Statistical Association*, 29:383-388 (1934); S. Kuznets, *National Income and Capital Formation, 1919-1935*; National Resources Committee, *Consumer Incomes in the United States*; and M. Leven and others, *America's Capacity to Consume*.

<sup>20</sup> Some of these are: (1) *America's Capacity to Consume*, which gives estimates for the year 1929 by states and regions in total and per capita figures for (a) aggregate personal income of the total population, the non-farm population, and the farm population (b) aggregate personal income for the non-farm population by types of income (pp. 175-176).

(2) *National Income and Its Elements*, which provides estimates by states for the years 1929 and 1933 of (a) accountable realized income, all items (pp. 73-75), (b) realized income, production and accountable, per capita (p. 97), and (c) total realized production income by type (p. 98). Supplementary data for years not covered in this study have been presented by J. A. Slaughter; see "Income Received by the Various States, 1929-35," *National Industrial Conference Board Bulletin*, Vol. 9, No. 5, (1937), and *Idem 1936-37*, Vol. 12, No. 2 (1938).

(3) *Consumer Incomes in the United States* which gives mean and median family incomes by region for the year 1935-36 (p. 22).

derived from these studies for a particular region is indeed very limited, consisting in the main of total and per capita estimates of various types of income by states.

Some outstanding beginnings in the field of income research have been made by Southern workers. Studies for the region as a whole have been made by Clarence Heer,<sup>21</sup> E. Z. Palmer,<sup>22</sup> and Donald S. Murray.<sup>23</sup> Further, an excellent study of income by counties in Alabama has been completed by W. M. Adamson.<sup>24</sup> Valuable as these studies are, they lack much in completeness of coverage even for major groups in the population. This is due primarily to the fact that dependable data are lacking for all but the broadest population classifications. While many studies have been made of selected groups within the South, the data from them is of little value in estimates of regional, sub-regional, or state income.<sup>25</sup> This is primarily due to the fact that the groups covered in these studies have not been selected in a manner that would make regional estimates possible. Furthermore, the methods of collecting and presenting the data, as well as the definitions of income used, differ so greatly that even if the previously mentioned limitation were not present, estimates based on these data would at best be quite inaccurate.

The Study of Consumer Purchases provides the most detailed information yet available regarding income in the South. While the limitations of the sample do not permit detailed generalizations concerning the income of the whole Southern region, accurate knowledge is available for the major groups and sub-regions covered.<sup>26</sup> For the Southeastern region the following major types of information are available for the various types of communities included in the survey: (1) Family income, according to (a) relief status, (b) nativity, (c) color, (d) family type; (2) Sources of Income, (a) total, (b) earnings, (c) other money income, (d) non-money income; (3) Responsibility for Family Support, for non-relief families; (4) Family Occupation

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<sup>21</sup> *Income and Wages in the South.*

<sup>22</sup> "Sources and Distribution of Income in the South," *Southern Economic Journal*, 2:47-80 (1935).

<sup>23</sup> "Income in the Southern States," *Research in Income and Wealth in the South.*

<sup>24</sup> *Income in Counties of Alabama, 1929 and 1935.*

<sup>25</sup> These studies have been made by the various agencies of the state and national governments and the research departments of universities, colleges, and agricultural experiment stations. For some of the more important of these publications consult the bibliography.

<sup>26</sup> The following states were included in the sample: South Carolina, North Carolina, Georgia, Alabama, and Mississippi. The types of communities and the number of each included in the sample were: Large cities (250,000-300,000), 1; middle-sized cities (30,000-70,000), 2; small cities (10,000-20,000), 4; villages (500-5,000), 34; and farm counties, 22.

and Income Levels; (5) Living Quarters, Home Tenure, and Rentals. In addition, special breakdowns will be made for various types of communities covered and inter-community comparisons may be attempted.<sup>27</sup>

#### Studies of Consumption

Studies of total consumption may properly be considered the best source of information on levels of living. What is known of the consumption of goods and services on a regional basis must consist of estimates built up either from data taken in the field on a sampling basis or from reports of sales of consumer's goods in the area. In recent years, several attempts have been made to construct such estimates for the nation as a whole.<sup>28</sup> Of these studies, only the one by Lynd includes estimates for the separate states or regions.

However, there are many studies of the consumption of certain major groups in the South. These include: Studies of urban industrial and clerical families, made primarily by the Bureau of Labor Statistics; studies of rural farm families, made by the departments of the state agricultural experiment stations and the various bureaus and divisions of the Department of Agriculture; and studies of problem groups, made by the Division of Social Research of the Works Progress Administration (and its predecessor, the Federal Emergency Relief Administration) and the Bureau of Public Health.<sup>29</sup> While it is possible that from these various sources sufficient data could be compiled to make possible the construction of estimates of consumption levels for some groups in the population, an examination of the studies reveals large gaps that make it impossible to build up useful estimates for the population as a whole. The gaps are especially noticeable when it comes to village families, urban high- and medium-income groups, Negro families both rural and urban, and high-income farm families. Further, the methods of sampling, collecting, summarizing and presenting the data reported, as well as the definitions used in these studies, are so varied that it is questionable whether estimates could be made even for the groups covered.

In addition to these studies, there are those, made principally by the home economists, of the consumption of selected items such as food and clothing. These studies analyze pri-

<sup>27</sup> See A. D. H. Kaplan and others, *Family Income and Expenditure in the Southeastern Region 1935-1936*, Vol. I, "Family Income" (Urban series). The small city and rural series will be published in the near future.

<sup>28</sup> M. Leven and others, *America's Capacity to Consume*; W. H. Lough, *High Level Consumption*, pp. 236-247; R. S. Lynd, "The People as Consumers," *Recent Social Trends in the United States*, Ch. 17; National Resources Committee, *Consumer Expenditures in the United States*.

<sup>29</sup> For a selected list of these consult the bibliography.

marily the quantity and quality of these commodities consumed in relation to pre-established scientific standards. While this information is very useful, not enough has been collected to make generalizations for the region possible.<sup>30</sup>

Much useful information regarding consumption in the Southeastern states will be gained from the Study of Consumer Purchases. While the sample used will not permit generalizations for the South as a whole, it will at least make possible general estimates of consumption in the area covered and some conclusions regarding the relationship between income and consumption patterns for the major groups represented. From the release for selected Southeastern cities it appears that most pertinent to our needs will be the analysis of consumption patterns according to income levels.<sup>31</sup> This includes the allocation of income, both monetary and non-monetary, to the major categories of consumption and to savings. When the study is completed, further information for selected income groups will probably be given on the amount and type of food consumed. Data on housing and home conveniences will also be presented according to income levels. Most of these findings will be shown according to (1) type of community, (2) family type, (3) race and nationality, and (4) occupation. Numerous other breakdowns will be given for selected groups.

#### Studies of Housing and Home Conveniences

Many of the studies of family living in the South carry some description of housing conditions and home conveniences. In addition, there have been several studies devoted entirely to this aspect of level of living.<sup>32</sup> These are more numerous for farm families than for any other major group in the population, although some study has been made of low income urban groups. The findings presented in these studies include: value of house, condition of house, rent, room-per-person ratios, sanitary facilities, window space, furniture, home conveniences, and labor saving devices. While some of these are judged according to accepted standards, most of them are not. In any event, the lack of basic knowledge concerning the housing conditions and needs of the various groups in the population of the South is a major gap in our understanding of levels of living in the region.

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<sup>30</sup> See especially H. K. Stiebeling, *The Food Supply of Families Living in the Southern Appalachians*; D. Dickins, *A Study of Food Habits of People in Two Contrasting Areas of Mississippi*; *Idem*, *A Nutrition Investigation of Negro Tenants in the Yazoo Mississippi Delta*; and, *Idem*, *Clothing and House Linen Expenditures of 99 Rural Families of Mississippi During 1928-1929*.

<sup>31</sup> A. D. H. Kaplan and others, *Family Income and Expenditure in Selected Southeastern Cities*, Vol. II, "Family Expenditures" (Urban Series).

<sup>32</sup> See especially D. G. Carter, *Arkansas Farm Housing Conditions and Needs*; E. LeNolr and T. L. Smith, *Rural Housing in Louisiana*; and E. W. Stevens and H. Estabrook, *North Carolina Farm Housing*.

### Other Indicators of Levels of Living

Numerous items available from official reports of the various agencies of the state and national governments have been used as indicators of levels of living on a regional, state, or county basis. Howard W. Odum has compiled extensive information of this sort for the Southern region and for the nation as a whole.<sup>33</sup> Most commonly used items include: income tax returns, motor cars, value of dwelling, telephones, radios, homes with electricity, homes with running water, retail sales, newspaper circulation, gross farm receipts, and savings deposits.

Recently, statistical techniques have been applied to such indicators to determine their differentiating capacity, and those items found to possess superior diagnostic ability have been combined into indexes for the measurement of levels of living.<sup>34</sup> Morris M. Blair has constructed indexes for the rural farm, the non-farm, and the total population, and has applied them to the counties of the thirteen Southern states.<sup>35</sup> Rough though such indexes are, they provide a useful way of approximating levels of living on a county, state, or regional basis.

### Needed Research on Income and Levels of Living in the South

Most of the research needs of the South relative to the uses of income in relation to levels of living are by no means peculiar to the area. While considerable work has been done in the field of family living in general, many major problems persist. In the discussion that follows, brief comment will be made on several of these. It is hoped that this discussion will focus the attention of the participants on, and stimulate further discussion of, the research needs in the field in general and the South in particular.

### The Need for Standardization in Terminology and Methods

Anyone who is acquainted with the literature on income and family living in the South can but be impressed with the need for standardization in terminology, in methods of collecting and analyzing data, and in presenting results. Many of the available studies are made almost useless for the purposes of constructing estimates and making comparisons because of the

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<sup>33</sup> See *Southern Regions of the United States* and other writings by the same author.

<sup>34</sup> C. E. Lively and R. B. Almack have pioneered in this work. See *A Method of Determining Rural Social Sub-Areas with Application to Ohio*; and, *Rural Social Areas in Missouri*. See also, C. Goodrich and others, *Migration and Planes of Living 1920-1934*, pp. 13-25.

<sup>35</sup> *Indices of Level of Living for the Thirteen Southern States by Counties, 1930*.

“private” meaning of the terms in which their findings are expressed and the variations in the manipulations gone through to obtain them. On the problem of standardization of terminology much progress is being made. The definitions used in the Study of Consumer Purchases are likely to be widely accepted. Doubtless the Bureau of Home Economics, the Bureau of Labor Statistics, and the Division of Farm Population and Rural Welfare will all continue to exert considerable influence in the formulation of a standardized terminology.

In the collection and analysis of data and the presentation of results, the need for standardization is likewise great. This is not to say that variations in techniques should be avoided—certainly the development of new and promising techniques should be encouraged—but at least enough uniformity should be maintained to make the results of studies useful for purposes of summary and comparison. In this connection it may not be out of place to call attention to the fact that many studies of family living in the South still continue to ignore some of the very well accepted statistical techniques that have been developed for use in this field. This is probably due in a large part to the fact that writings on this subject are somewhat scattered and rather technical. A worthwhile project for some competent scholar would be to write a monograph bringing together the various statistical techniques and methods of research that may best be applied in this field.

#### **The Need for Information on Income and Consumption on a Regional Basis**

At the present, perhaps the most pressing need is for accurate information on family income and consumption patterns of the major population groups in the region. This will have to come from carefully planned field studies that include the various major income groups, both Negro and white, in the urban, village, and farm populations. The Study of Consumer Purchases will provide much of the necessary information. However, it will be necessary to supplement these data with similar information concerning the groups and areas not represented in that study. The resulting data may then be used to construct accurate estimates for the population of the region as a whole and for its component groups.<sup>30</sup> Of course, the costs of obtaining this information would be tremendous. Perhaps this difficulty may be overcome by the inauguration

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<sup>30</sup> Nothing will be said about the methods of constructing estimates, since this is a highly specialized and technical subject demanding considerable knowledge of statistics and accounting. For a discussion of this matter, see the appendixes on methods in the titles cited in footnote 19 and Conference on Research in National Income and Wealth, *Studies in Wealth*, Vols. I, II, and III.

of cooperative studies in which the state and local research agencies will work with the various agencies of the national government that are interested in the problem.

#### The Measurement of Non-Monetary Income

One of the basic problems in the measurement of income is that of devising and perfecting techniques for measuring the non-monetary factors involved.<sup>37</sup> The present methods of assigning monetary values to goods produced and retained for consumption purposes, to payments in kind to employees, and to services of houses occupied by their owners, while far from satisfactory, present no such problem as does the evaluation of the non-monetary goods and services that are not shown in income totals.<sup>38</sup>

The need for determining the value of the income received in the form of unpaid services of the housewife and that accruing from the superior efficiency with which goods and services are used by some families is especially pressing if inter- or intra-income group comparisons are to be made and if accurate estimates are to be obtained of the income of a group of families. Just how these factors may be taken into account is a most perplexing problem. Perhaps an intensive study of time budgets of housewives chosen to represent various socio-economic classes both in the rural and urban populations would provide a clue that would be useful in solving the problem of evaluating the services of the housewife.<sup>39</sup> At least the results gained from a carefully executed study of this kind would make possible some estimate of the variations in the time spent in non-monetary but useful pursuits. In addition to the many difficulties that beset time budget studies in general, there would be those of defining what activities are to be considered useful and of determining the efficiency with which time is spent in pursuit of them.

As to the efficiency with which goods and services are used, a beginning might be made by determining the rate at which

<sup>37</sup> Discussion of the problem of measuring monetary income is omitted since excellent statements regarding this subject are available. Consult the various works cited in footnote 36.

<sup>38</sup> Discussion of the problem of imputing monetary values for income from the three sources mentioned is omitted since the writer has nothing to say about it that has not already been better said by others. See especially Williams, "The Statistical Schools" in Williams and Zimmerman, *Studies of Family Living in the United States and Other Countries*, pp. 62-65, and Zimmerman, "Objectives and Methods in Rural Living Studies," *Journal of Farm Economics*, 9:233-236 (1937).

<sup>39</sup> Some preliminary study of this type has been made, especially of farm homemakers. See W. C. Funk, *What the Farm Contributes Directly to the Farmers' Living*, and I. Z. Crawford, *The Use of Time by Farm Women*. Since the technique of time budget study has been greatly improved in recent years, new studies might well be undertaken. See P. A. Sorokin and C. Q. Berger, *Time Budgets of Human Behavior*, and G. A. Lundberg and others, *Letsure, a Suburban Study*.

certain of the more durable goods of specified qualities are consumed by families of various socio-economic levels. If this were done it would be necessary to control as many factors as possible that might influence the results of the experiment. These would include family type, income level, nationality, race, type of community, home environment, natural environment, and many other factors.

The need for methods of measuring psychic income is likewise great. Most students of family living in the United States have very studiously avoided anything further than a half-hearted acknowledgement of its existence. Most devotees of the statistical school have avoided such analysis on the ground that psychic values are not measurable. To the writer this position seems untenable in light of recent developments in the field of psycho-social measurement. Surely if other social values, such as opinions and attitudes toward war, the church, government, etc., can be expressed quantitatively—and many competent research workers think that they can—there is little reason to believe that psychic income cannot. The general pattern of attack has been set by the social psychologists.<sup>40</sup> It is difficult to believe that students of family living will long ignore the challenge.

Even if the various types of studies of non-monetary income that have been suggested were to produce results, the problem of assigning monetary values to them would still remain.<sup>41</sup> Perhaps this problem does not need to be solved. It may well be that indexes of time use, rates of efficiency, and standardized psychic income scores, or other quantitative expressions of these variables, would be more meaningful than monetary evaluations.

#### **Evaluation of Consumption, Standard Budget, and Cost of Living Studies**

Few studies of family living in the South have attempted to evaluate the levels of living of the families concerned in terms of definite standards. If a better understanding of the adequacy of the existing levels of consumption is to be had, it will be necessary to give more attention to this matter in future studies. Such evaluations may be made by comparing either total expenditures or total income with the cost of a standard budget

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<sup>40</sup> See especially L. L. Thurstone and E. J. Ohave, *The Measurement of Attitude*; R. Likert, "A Technique for the Measurement of Attitudes," *Archives of Psychology*, No. 140; E. A. Rundquist and R. F. Sletto, *Personality and the Depression*; and, G. Murphy and R. Likert, *Public Opinion and the Individual*.

<sup>41</sup> There are, of course, several other types of non-monetary income. See p. 8. These are not discussed here since in the main they present similar problems.



or by comparing the actual content of living with the content of a standard budget.<sup>42</sup> In either case, size, sex, and age characteristics of the family must be held as nearly constant as possible.

Possibly one reason why so few studies have attempted to evaluate consumption in these terms is that standard quantity and quality budgets which are satisfactory for application to the families studied have not been available. Considerable attention might well be directed to either the revision of existing standard budgets or to the construction of new ones for the farm, village, and urban family groups of the South. These budgets would not only be useful in the evaluation of levels of living but also in determining intra-regional differences in cost of living<sup>43</sup> and in the construction of regional cost-of-living indexes for the farm, village, urban, and total population.<sup>44</sup> Much attention might well be given to the latter types of research.

#### Level of Living Indexes

Considerable research effort might well be expended on the construction and standardization of multiple-factor indexes for the measurement of levels of living on a regional, state, county, and family basis. The indexes that have been developed for use on an area basis might well be refined by further tests of their validity, the inclusion of a larger number of valid items, and the use of more satisfactory weighting techniques.<sup>45</sup> Perhaps as public statistics become more exact and more readily available, much may be accomplished in research of this type.

Several scales for use on individual families have been developed recently for the measurement of variables closely related to level of living. These include among others: the Chapin Social Status Scale, which has been standardized for urban families;<sup>46</sup> the Leahy Home Status Index, which was devised and standardized for the measurement of urban home en-

<sup>42</sup> For examples of standard budgets see: Heller Committee for Research in Social Economics, *Quantity and Cost Budgets*; Bureau of Labor Statistics, "Minimum Quantity Budget Necessary to Maintain a Worker's Family of Five in Health and Decency," *Monthly Labor Review*, 10:1307-24; and M. L. Stecker, *Quantity Budgets for Basic Maintenance and Emergency Standard of Living*.

<sup>43</sup> Studies similar to M. L. Stecker's might well be made for the major population groups in the South. See *Intercity Differences in Costs of Living*.

<sup>44</sup> The Bureau of Labor Statistics, The United States Department of Agriculture, and the National Industrial Conference Board all publish indexes of cost of living from time to time. These indexes are of great value on a national basis. However, their usefulness diminishes when they are applied to regional or local groups.

<sup>45</sup> In this connection the suggestions of W. C. McKain, Jr., are interesting. See "The Concept of Plane of Living and the Construction of a Plane of Living Index," *Rural Sociology*, 4:337-343 (1939).

<sup>46</sup> F. S. Chapin, *The Measurement of Social Status*.

vironment;<sup>47</sup> and, the Farm Family Socio-Economic Status Scale, which has been standardized on Oklahoma farm families and is now being tested in the South and other regions.<sup>48</sup> Since these scales are based on family possession, achievement, and social participation items, all of which may be considered a part of level of living, they may be used to obtain at least a rough quantitative measurement of this variable. Considerable attention should be devoted to the further improvement of these scales and to the construction of more adequate ones.

#### **Sociological Aspects of Income and Levels of Living**

To the writer, the most apparent need in the whole field of family living is for basic research on the sociological aspects of family life in the South. While the collection and analysis of economic data is of undoubted importance, it is only a part of the problem. Income and consumption data, no matter how carefully they are collected and analyzed, can give little more than a surface picture of family living. In respect to the particular aspect of the subject under discussion, the basic need is for intensive research on the relationship between both income levels and consumption patterns and (1) the structural and functional aspects of family organization, (2) the attitudes of family members toward each other, the community, and social institutions, (3) community organization, (4) social mobility, and (5) the various social processes. There are of course studies dealing directly with certain of these relationships, but in general there has been very little intensive study of them in relation to income or consumption levels either in the South or elsewhere.

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<sup>47</sup> A. M. Leahy, *The Measurement of Urban Home Environment*.

<sup>48</sup> W. H. Sewell, *The Construction and Standardization of a Scale for the Measurement of the Socio-Economic Status of Oklahoma Farm Families*.

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