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Researching Quality of Life in a Developing Country: Lessons from the South African Case

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Paper for the
International Workshop on

Researching Well-being
in Developing Countries

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Hanse Institute for Advanced Study
Delmenhorst, near Bremen, Germany
2-4th July 2004

Researching Quality of Life in a Developing Country: Lessons from the South African Case

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Paper prepared for the Hanse Workshop on Researching Well-being in Developing Countries, Delmenhorst, Germany, 2-4 July 2004

South Africa serves as a social laboratory for studying quality of life in developing countries. In spite of being located on the least developed African continent, South Africa straddles the First and Third Worlds. It is a nation characterised by varying levels of development, vast income inequalities, and cultural diversity in terms of language, religion, ethnicity and settlement patterns. It is this rich mix of diverse living conditions that lends itself to experimenting with the development of concepts and instruments to adequately capture the essence of quality of life and its measurement.

This paper reports on the South African Quality of Life Trends Project, which commenced in the late 1970s, and spans over twenty-five years. The project, currently managed by Rhodes University's Institute of Social and Economic Research in Grahamstown, has tracked the satisfaction and happiness of South Africans against the backdrop of changes occurring in society before and after the coming of democracy (Møller and Schlemmer, 1983; 1989; Møller, 1988b, 1989; 1992a; 1994b, 1995a; 1998; 1999a; Møller and Dickow, 2002). There may be lessons to be learnt from its successes and shortcomings which have become evident with the wisdom of hindsight.

The South African initiative was a child of its time and, to a certain degree, reflects some of the developments and the sophistications that have occurred in quality-of-life studies and the social indicators movement during its forty-year history. Contemporary researchers seeking to extend quality-of-life studies to developing countries in South America, Africa and Asia, may find that they are travelling well-worn paths when they adapt methods tried and tested elsewhere. Similar guidelines may apply in a range of different social contexts in developing countries.

For the sake of a better overview, reporting on the South African quality-of-life project is divided into three phases: the experimental, consolidation, and innovation phases.

I The Experimental Phase: Definition Of Concepts And The Development Of Models And Instruments

“Because there is no generally accepted scientific theory of a good society, whoever sets out to describe and evaluate all the important features of a society must consult widely with the people living in that society. Clearly, this task increases in difficulty as the size and diversity of the society to be evaluated increases.” (Michalos 2003:7)

Initially our research was preoccupied with identifying and defining key concepts, developing a theoretical model to guide the research, and fine-tuning the research instrument. Alex Michalos (2003) notes that quality of life has both descriptive and evaluative connotations; we need to know the nature of the good society as well as the value of the essential qualities of life. Accordingly, our first task was to define the essence of the good life in South Africa

and then to developing the method to assess the degree to which real life matched the good life.

In the late 1970s and early 1980s the concept of quality of life was used very loosely in South African society. It had become almost a catchword among policy makers and lay persons although its meaning was by and large illusive. This ambiguity presented us with a challenge to add precision to a term that could be seriously misused.

The classical works on quality of life by Andrews and Withey (1976) and Campbell, Converse and Rodgers (1976) had just become available to South African researchers in the late 1970s and we used them to guide our conceptualisation of quality of life. In line with the Andrews and Withey bottom-up model of quality of life, we attempted to list the concerns that define quality of life for South Africans. The model assumes that overall subjective well-being is the sum of satisfactions with all the salient concerns in an individual's life.

Following the lead of our US mentors, we sifted through materials from focus group discussions to identify key concerns in the lives of ordinary South Africans. To save on time and research costs, we took a shortcut and relied on secondary data drawn from a study in what is known today as Gauteng Province. This industrial and commercial heartland attracts a cross-section of the South African population from all corners of the country in search of the 'good life' and thus lent itself for the task at hand. We then ordered the concerns raised in the focus group sessions into domains or aspects of life which could be presented to respondents in a survey situation. We also considered criterion-level concerns which zoom in on particular facets of domains, such as the accessibility, the cost, or the quality of housing, education or other services. Many of these criteria are crosscutting values that are relevant in many different domains of life. For example, we found that the cost factor, such as affordability, was an important criterion that enhanced or restricted fulfilment of basic needs and personal development across a wide range of domains.

Initially, the focus group materials yielded close on 400 concerns. This number of items was reduced to a more manageable number for the pilot study conducted among subsamples drawn from South Africa's then four official race groups. The number was reduced even further after the first round of research conducted with a national sample.

Many of the concerns identified in this first phase turned out to be universal, such as concerns about the self, the family, food, and leisure. However, a number of criterion-level concerns did touch some of the raw nerves of South African society at that time. Examples are the right to vote, and choice in housing. There were also some blatant researcher biases. Previously, we had been involved in research on township housing to explore the impact of living in matchbox houses on well-being (Møller and Schlemmer, 1980). We had also inquired into the job satisfaction of migrant workers, who were excluded from permanent resident in urban centres under South Africa's migrant labour system. This earlier focus on housing and migrancy resulted in the domain of housing and work receiving better coverage than some other domains in the final set of indicators.

The final set of indicators included 35 items at the global and domain levels (see Chart 1). Domain-level concerns were rated on a satisfaction scale. The global items refer to satisfaction with life-as-a-whole, global happiness, and perception of life getting better or worse. With exception of the latter item, all items were measured on a five-point labelled Likert scale. A number of statistical analyses assisted in making the choice of items in this final set. The selection criteria were cross-cultural relevance, reliability and validity, significant impact on overall perceived quality of life, and policy relevance (Møller and Schlemmer, 1989).

Chart 1
Set of 35 indicators applied in the South African Quality of Life Trends Project
(1983 – 1995)

Global indicators of subjective well-being	Life compared to other race groups
Life satisfaction	Respect from other race groups
Global happiness	Race relations
Life rewarding (versus frustrating)	Freedom of movement
Life getting better (versus worse)	
Domains of living	<i>Housing</i>
	Own present dwelling
	Size of dwelling
<i>Family life</i>	Availability of housing
Family happiness	Choice of where to live
	<i>Education</i>
<i>Personal life</i>	Own education
Yourself as a person	
Respect in the community	<i>Community facilities</i>
Loyalty of friends	Public service
Peer group adjustment	Transport costs
Intimate relationships	Security against crime
Spare time activities	
Fun in life	<i>Work</i>
<i>Food</i>	Job opportunities
The food you eat	Independence at work
	Treatment at work
<i>Health</i>	<i>Income and social security</i>
Own health	Own wages/salary
Family health	Ability to provide for family
	Insurance against illness/death
<i>Socio-political issues</i>	Income in old age
Voting rights	

In line with best practice in South Africa in the 1980s, our sample surveys were administered by trained interviewers in the home language of respondents. In the first rounds of research, the questionnaires were translated into the major languages in use in the surveyed areas and back translated.

A number of critical research decisions taken at this stage of the research shaped the later course of the project.

Phrasing of quality-of-life concerns

The phrasing of probes used in our surveys represents such a considered decision. We wanted respondents to describe and evaluate their own lives, that is, their personal quality of life rather than the quality of society. Therefore all issues were personalised. Concerns were typically introduced as ‘your’ or ‘your family’s’ concern: the dwelling you live in here, the food you eat, your right to vote, etc. We did not want respondents to give blanket evaluations of issues of little relevance to their own lives.

Importantly, respondents whose lives were not touched by the issue under consideration, were not required to evaluate the concern. In the pilot phase, respondents first evaluated the importance of each concern before giving a satisfaction rating. In later stages, evaluations of items were only required if the concern was important, that is a salient issue, or if the concern

applied to the respondent. Thus, the survey operated with four off-scale responses of 'not important', 'not applicable' and the more conventional 'don't know' and 'non-response'. Items that attracted large percentages of off-scale responses typically included job-related issues and to a lesser degree, intimate relationships. In most analyses, 'don't know' responses were added to the intermediate category of 'neither/nor' satisfied or happy. The other off-scale responses were excluded.

In hindsight, one might argue that there were serious flaws in this reasoning. Firstly, we were restricting our study to personal quality of life regardless of the quality of society. This shortcoming was pointed out to us in a seminar on social indicators held in Cape Town in 1996. With oblique reference to the iniquities of the apartheid system, an activist seminar participant from the more privileged sector of society summed up the problem: 'How can I be happy when I know that many of my fellow country people are so badly off.'

Another shortcoming was the emphasis on the individual. In our strenuous efforts to avoid collecting superficial evaluations of life quality, we may have overlooked that South African society is largely collectivist. In line with the notion of African humanism, quality of life embraces whole families and households rather than mere individuals. Thus, many South Africans like their counterparts in other collectivist societies might consider it self-centred to reflect only on their personal well-being. Interestingly, we received echoes of collectivist perceptions of quality of life in the first survey returns. For instance, older individuals often declined to evaluate the education domain. 'Their' education was no longer a relevant issue in their lives, they maintained. Their time for learning has passed and they were more concerned that their children and grandchildren should receive a better education than they had.

Evaluation scales

Careful consideration was also given to the calibration of the evaluation scale. Such methodological issues are still subject to heated discussions today. In South Africa in the late seventies, mainly psychologists had assessed the merits of local applications of the various Likert-type scales, including five- and seven-point scales. We decided on a five-point scale with a neutral mid-point. In the first rounds of research we experimented with unlabelled and labelled scales including 'smilies'. Smilies were soon abandoned as they appeared to give rise to misinterpretation. We also experimented with various labels including versions of the Andrews and Withey 'delighted' – 'terrible' scale.

In the end, for simplicity sake we opted for the five-point labelled satisfaction scale ranging from 'very satisfied' to 'very dissatisfied' over a neutral 'neither/nor' mid-point. The majority of South Africans come from an oral tradition. Therefore, it made good sense to use labels. The labels were read out with each item. Further, we reasoned that domain-level items should be evaluated in terms of satisfaction rather than happiness, as the former is considered to be the more cognitive assessment (McKinnel and Andrews, 1980; Michalos, 1980). Public report cards should reflect cognition rather than affect if they were to be policy-relevant (see Hagerty et al., 2002)

Including the socially excluded

Our research was driven by the idea that quality-of-life studies should lend a voice to the invisible people who were denied the rights of ordinary citizens in their own country. In what might have been considered a renegade move at the time, we focussed first on the needs and concerns of the socially excluded sector of the population, the African or black population which made up the majority. We also dismissed the conventional viewpoint that illiterate people cannot meaningfully participate in sample surveys. In South Africa in 2003, some 18 per cent of the population had had no schooling and 14 per cent had not completed Grade 7, a level conventionally associated with literacy (SAIRR, 2003). The proportions of illiterate were even larger in the late 1970s. As is the case with people who have hearing or speech disabilities, the illiterate are often considered incapable of comprehending complex survey

questions. Our research team considered it a duty and a challenge to design a study that would include the voices of the illiterate who are overrepresented among the older and rural sectors of the population – precisely the people whose quality of life is depressed by most objective standards. It is overlooked that illiterate people come from an oral tradition that relies on memory. Thus they may have an advantage over the literate who rely on written props. For instance, we observed that illiterate respondents were quite capable of ranking survey options without the aid of show cards. We found that if we read out the labels that calibrated the satisfaction scale, South Africans from all walks of life could participate in our surveys.

Reporting format

A further conscious decision was taken when it came to the reporting format. We decided to report results in terms of percentages which are generally well understood rather than scores which would call for explanatory notes to identify the value of the endpoints, i.e., the best and worst scores. In the apartheid era, we were strongly tempted to report the negative rather than positive emphases of evaluations. Nevertheless, optimism prevailed and we decided to report on the percentage satisfied in the population. This is the proportion in the population that scores above the mid-point of the satisfaction scale. This satisfaction indicator can easily be compared with the ones found in the literature regardless of the calibration of scales used.

The statistical analyses of the results from the first rounds of research found that there was a major divide between all the satisfied responses versus all others. In the light of this result, we thereafter grouped the ‘fence sitters’, who stated that they were neither satisfied nor dissatisfied, together with the dissatisfied. We have found this basic division between the ‘satisfied’ and all others to be a useful one for all quality-of-life studies carried out in South Africa.

The illusive quality-of-life index

Quality of life researchers have always been fascinated by the idea of developing an index to match the powerful Gross Domestic Product. Nobel laureate Amartya Sen notes that the single index commands far more attention than disaggregated indicators. “People would look at them [separate indicators] respectfully, but when it came to using a summary measure of social development, they would still go back to the unadorned GDP, because it was crude and convenient.” (Anand & Sen, 1997, cited in Vogel and Wolf, 2004:7).

We were aware of the strong appeal of a single-figure index to convey how circumstances lived up to the public ideal. Initially, we had played with the idea of a composite quality-of-life index. Some seven indicators were identified as candidates for such an index. Notwithstanding the attractiveness of a QOL index for South Africa, we came to the same conclusion reached by many others: “most public policy interventions can be achieved merely by tracking the components of QOL” (Hagerty et al., 2001:6). The profile avoids the myriad problems of weighting. We reasoned that a profile of quality-of-life indicators would clearly pinpoint areas that fell short of citizens’ expectations of the good life, and needed urgent remedial action on the part of policy makers. Noteworthy is that other South African quality-of-life researchers have taken up the challenge of a quality-of-life index (Kok et al., 1997; Higgs, 2003) and Statistics South Africa produces a Human Development Index that is disaggregated by geographical region.

Objective and subjective indicators

When we designed our first study, we included a set of objective quality-of-life indicators to balance the subjective satisfaction indicators. The information for the objective indicators was collected by self-report, the same method currently used by Statistics South Africa to produce the country’s vital statistics on living conditions and opportunities. The set of objective indicators developed for our study covered basic needs, a popular approach at that time (Streeten, 1977). Essentially the choice of indicators was informed by Maslow’s (1970) hierarchy of needs.

The match between subjective assessments and objective living conditions was so strong in the first round of research, that from that time forward, we decided to concentrate on monitoring subjective quality of life, a by and large neglected dimension of quality-of-life studies in South Africa. This decision proved to be worthwhile in the longer term. It ensured that there was a balance between subjective and objective indicators to chart South African quality of life, a common viewpoint among contemporary researchers (see Veenhoven, 2002, among others). In the 1990s, the 'new' South Africa ushered in an era obsessed with performance indicators; one might speak of a South African social indicators movement (Møller, 1995b). The official system of social accounts was reorganised to allow coverage of all geographic regions of the country including the former homelands. However, subjective indicators were given no place in the new social accounts apart from isolated items in the annual household survey on perceived physical safety that interestingly featured under the heading of 'quality of life'.

We discovered that we would never be short of objective indicators to compare with our subjective ones. To extend the trendlines for our global indicators of life satisfaction and happiness, we regularly bought into syndicated surveys. Most syndicated surveys supply the commissioned data as well as information on demographics, levels of living, socio-economic status and socio-cultural identity in terms of language, ethnicity and, in some instances, even religion and political party preference.

One of the most striking findings from the first round of research was the strong association between objective living conditions and their subjective assessments. Typically, South Africans living in the worst conditions expressed dissatisfaction while those living in better circumstances were significantly more satisfied. The match was uncanny. Given the social order under apartheid, social indicators of the objective and subjective kind reflected a racial hierarchy (Møller, 1999b). We observed that scores for virtually every social indicator, regardless whether it was subjective or objective in nature, could be predicted in advance. Scores for black South Africans, the most oppressed whose living circumstances and opportunities in life were poorest – indicating that they were worst off or most dissatisfied. White South Africans, then the dominant group in society, scored highest – indicating they were best off. Persons classified as Indian and coloured under the South African population registration system fell somewhere in between. As will be reported later, under democratic rule, ten years on, this hierarchy of scoring still holds although some differentiation is beginning to occur (Møller, 2004a).

II The Consolidation Phase: Confirming Trends And Exploring Parts Of The Whole Picture

Trendlines

The full set of 35 indicators of subjective well-being including global and domain indicators has been applied three times during the apartheid and post-apartheid periods (Møller, 1998). Longer trendlines have been produced for the key global indicators of life satisfaction, happiness and life getting better or worse.

Results are striking. Citizen satisfaction peaked in 1994 in the month after the first open democratic elections (see Figure 1). Under apartheid, as mentioned earlier, levels of life satisfaction and happiness reflected the imposed racial hierarchy of power and privilege with whites mostly satisfied, blacks mostly dissatisfied, and Indian and coloured people falling somewhere in between. In May 1994, a month after the first open elections, black and white and rich and poor were equally satisfied with life for the first time. South African levels of satisfaction reached ones generally found in Western and democratic societies; approximately

four in five South Africans stated they were satisfied with life overall and happy. However, post-election euphoria was short-lived. Satisfaction levels have since returned to ones reminiscent of those under the former regime (Møller, 1998). Levels of dissatisfaction are particularly pronounced in the domains of income, social security, and access to jobs.

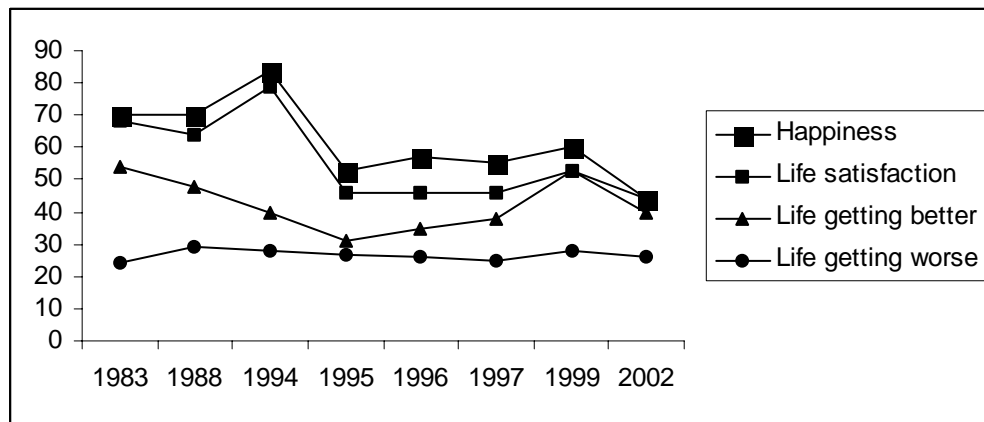


Figure 1. South African Quality of Life Trends: Percentages of South Africans happy, satisfied with life, and seeing life as getting better or worse.

In the latest survey undertaken for the *South African Quality of Life Trends Study* in mid-2002, only some 44% of all South Africans stated they were satisfied with life. Some 68% of whites were satisfied, 65% of Indians, 58% of coloureds, and only 37% of blacks (see Figure 2) (Møller, 2004a).

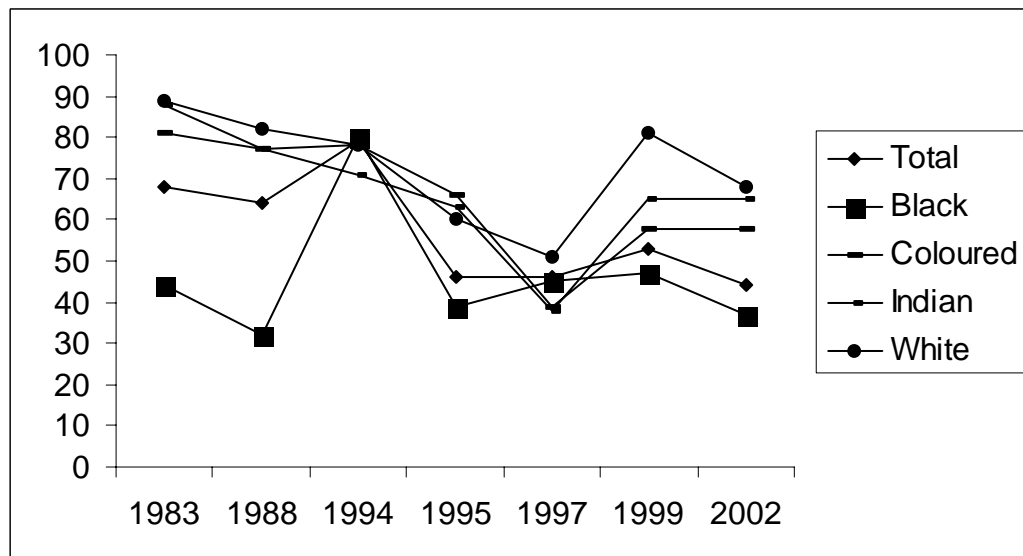


Figure 2. South African Quality of Life Trends: Percentages satisfied with life-as-a-whole

What would make ordinary South Africans happy? An earlier 1999 survey undertaken for the *South African Quality of Life Trends Study* posed this question. Poorer respondents thought they would be happier if their material living conditions improved and cited wants such as access to jobs and livelihoods, housing, infrastructure services – water, electricity, sanitation, and education, In short, poorer South Africans listed the ingredients of the elections promises and South Africa’s ambitious post-1994 Reconstruction and Development Programme. In contrast, safety and security issues – ‘less crime’, and a strong economy featured more prominently in the wish lists of richer South Africans (Møller, 1999a).

The conclusions to be drawn from these quality-of-life trends are clear-cut. Once South Africans gained political freedom, 'bread and butter' issues, such as lack of income security and unemployment, eclipsed other life concerns among the black majority, which according to the latest census make up 79% of the country's population of close on 45 million in 2001.

Validity and reliability

The repeat application of the instrument inspired confidence that our measurement tools were reliable and valid. Although we observed that the economically disadvantaged and racially discriminated consistently evaluated their lives and aspects of their lives less favourably than others, nuances did emerge. For instance in the first two rounds of research conducted in 1983 and 1988, we observed that even within the African subsample, the economically stronger and the better educated generally tended to express higher levels of satisfaction although there were severe restrictions on access to higher standards of housing and other status symbols of the middle class. However, in some instances we observed that, say, the better-educated sectors of the African urban subsamples expressed lower levels of well-being. We interpreted this as a sign of frustration and feelings of relative deprivation with one's lot in a society that does not allow certain sectors of the population to reap the rewards of personal achievement.

On the basis of the trendline we were able to identify four striking features of quality of life in South Africa.

1. There is a vast discrepancy between the levels of satisfaction of black and white and of rich and poor in society.
2. Optimism correlates negatively with current happiness. Black and poor South Africans expect to be more satisfied with life in future, albeit from a low satisfaction base, while better-off whites and Indians tend to be more pessimistic.
3. There is a close match between objective and subjective indicators, that is, between perceived well-being and standards of living.
4. Overall life satisfaction and domain satisfactions appear to be sensitive to changing circumstances in society. Importantly, satisfaction seems to increase with rising living levels.

In spite of increasing confidence in the validity of our subjective indicators of life quality, some reservations remained. For example, we were concerned that members of different cultural groups, say individualists or collectivists, might be using the satisfaction rating scales in a different manner. The literature has observed tendencies among certain non-western groups to avoid the poles or to 'play it safe' and use middle categories (Diener and Suh, 2000). It is a known factor that the ideal of extraversion tends to exaggerate self-esteem and personal well-being in western societies, whereas in Japanese and many other eastern societies, the ideal of modesty colours self-assessments of well-being. Results from case studies and a serendipity finding raised our concerns about possible bias on the grounds of cultural and technical artefacts that might have crept into South African quality-of-life evaluations.

Cultural artefacts

Results from one of our early studies hinted that cultural artefacts might serve to exaggerate the differences in perceived subjective well-being among the South African elderly. In a study of the living circumstances of over sixties conducted in the early 1990s, we found that the African elderly tended to endorse most complaints covered in the survey including illness, other minor disabilities, everyday activities of living, and worries in life, whereas the white elderly appeared to deny experiencing many of these problems or to a lesser degree. Differing

attitudes to one's aches and pains and problems in life were also reflected in the extreme variations between black and white well-being scores. Drawing on the anthropological literature in gerontology, we interpreted these divergent reactions by referring to contrasting norms prevailing in black and white communities (Møller and Ferreira, 1992). The traditional ideal in African society is for older persons to be venerated. Respect for the older generation prescribes that the younger generation should care for the elderly and relieve them of duties and chores so they can sit back and be waited on. The evidence of a 'complaining ethic' found in our survey might serve as a reminder to the general public of its duty to preserve the dignity of the older generation. In contrast, western society sets greater store by independence and self-reliance in seniors which might have prompted the white elderly in our survey to respond in line with this social expectation. We concluded that divergent cultural norms that reinforced discrepancies in living conditions and opportunities served to exaggerate the gulf between white and black well-being.

Suspensions that the happiness deficit of the black sector of South Africa's population might in part be due to cultural factors lingered on throughout the 1980s and early 1990s. However, a major breakthrough occurred in 1994 which dispelled our concerns that South Africa's cultural heterogeneity might be responsible for the stark differences in subjective well-being. There was extensive voter education in the run-up to the first democratic elections held on April 27 1994. We took the opportunity to insert our indicators of life satisfaction and happiness into a study to evaluate the success of these voter education programmes (Møller and Hanf, 1995; Møller 1995c). To our amazement and delight, for the first time in South African survey history, the gap between black and white happiness and satisfaction had miraculously disappeared. The first open elections surpassed all expectations when they went off peacefully. They were regarded as South Africa's miracle. To us it was no less a miracle that under conditions of political freedom first-time voters had no difficulties in placing their mark on the top end of our happiness and satisfaction scales. This result boosted our faith enormously in the validity of the measures of well-being in the South African Quality of Life Trends project.

Confidence was boosted yet again, when the third round of research for the full set of indicators for the South African Quality of Life Trends Study showed that the election euphoria bubble had burst (Møller, 1998). Happiness and life satisfaction scores among the materially less privileged had dropped closer to earlier levels. This prompted us to speculate where the new set-level of South African happiness might come to rest, as and when the expectations of the newly enfranchised were met or frustrated (Møller, 2001b).

Technical artefacts

To aid comparison over time, the South African Quality of Life Trends Survey has used the same research organisation and identical indicators in cross-sectional sample surveys. MarkData, a reputable research organisation based in Pretoria, to whom we have commissioned our national surveys uses a sample design that covers the entire country. A number of other local research organisations cover only the urban areas. The sample is weighted to census figures. Questionnaire surveys are administered by trained interviewers who carry out personal interviews in the language of choice.

Looking back, a major methodological shortcoming of the earlier rounds of research for the South African Quality of Life Trends Survey was the lack of an accurate estimate of subjective quality of life for the total population. In the 1970s and 1980s, the South African population was typically sampled according to race group. The national accounts produced by the official statistical office excluded the rural population in the homelands. To complete the picture, the South African Institute of Race Relations undertook to assemble statistics on the excluded sectors of the population from a range of alternative sources. The first two rounds of research for our quality-of-life project used an 'apartheid' sample that applied different sampling frames for each of the four official population groups. In the first round of research,

an exemplary sample of rural blacks was drawn in two homelands. The early nineties saw research organisations switching to new survey designs that sampled according to the geographical distribution of population throughout the country. Carefully designed stratified samples yielded credible values of social indicators for the total population. In contrast to earlier censuses, the 1996 census counted the entire population rather than relying on aerial photography and sample surveys in remoter areas. From this time forward, most South African researchers have based their designs on census enumerator areas and census results to achieve representative population samples for their surveys. In our case, all post-1994 surveys used the new South African sample which produces fairly accurate estimates of population well-being.

Although we expended great effort to ensure that phrasing in surveys undertaken for the South African Quality of Life Trends project remained identical or as similar as possible, we had given lesser attention to bias introduced by the recording of responses. Inadvertently, the format in which responses were recorded in 1995 was changed. In the first rounds of research, all off-scale options ('not applicable', 'not important', 'don't know' and 'non response') were given separate codes which were listed after the on-scale responses in the questionnaire (see Chart 2). Even the non-committal middle category 'neither satisfied/happy nor dissatisfied/unhappy' was placed after the committed evaluations referring to degrees of satisfaction. In the 1995 round of research – the first in the democratic era – a much larger proportion of the sample in all population groups were 'fence sitters' who gave middling evaluations of 'neither/nor' satisfied with life and aspects of their lives. This result was first interpreted as a reflection of the many uncertainties experienced by South Africans during the transition from a closed apartheid society to an open economy under democracy (Møller, 1998). It was only after inspection of the questionnaire schedules used in the earlier surveys that the real reason for the increase in the proportion in the middle response categories became evident. The middle response category was placed on-scale in 1995 and off-scale in the earlier 1983 questionnaire (Møller, 2001b). With the wisdom of hindsight, some quality of life trends might be distorted by bias introduced during the recording of survey responses!

Chart 2

Response formats for satisfaction ratings of domains used in three rounds of research for the South African Quality of Life Trends Project (1983 – 1995)

1982/3 round of research

Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Neither satisfied nor dissatisfied	Don't know	Not important	Not applicable
1	2	3	4	5	6	7	8

1988 round of research

Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know	Not important	Not applicable
1	2	3	4	5	6	7	8

1995 round of research

Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Not important	Not applicable	Don't know
1	2	3	4	5	6	7	0

Another possible source of bias in recording might arise from the order of assigning scale values. Most quality-of-life researchers assign high values to positive predictor and outcome variables. Thus, there is a tendency to assign a high value to the positive pole of the satisfaction scale, that is, to being satisfied rather than dissatisfied. However, the phrasing of most satisfaction items usually mentions the positive pole first and thus the satisfied response is coded as 1 while the opposite pole receives the higher value. In this case, satisfaction scales must be reverse coded in the analysis stage to avoid a surfeit of negative signs in the results of bivariate or multivariate analysis. Noteworthy is that the various case studies on quality of life in South Africa have used different formats and codes for recording satisfaction.

Branching out

In the consolidation phase of the South African Quality of Life Trends Project a number of studies were conducted to inquire in greater depth into the situation of specific categories of the population such as the unemployed (Møller, 1993), return migrants (Møller, 1988a) and polygamists (Møller and Welch, 1990). Other studies focused on the quality of life of youth (Møller et al., 1991; Møller, 1994a; 1996b; 2003), the elderly (Møller, 1992b), and social pensioners (Møller, 1992d; Møller and Sotshongaye, 1996; Møller and Devey, 2003; Møller and Ferreira, 2003). Studies of the quality of life of township dwellers were complemented with those of people living in the rural homelands. Inquiries into quality of life in unemployment were balanced by leisure studies to explore how coping skills and personal development opportunities enhanced well-being. Time use studies among the youth (Møller, 1992c) and the elderly (Møller, 1996c) provided valuable insights into the manner in which South Africans achieved satisfaction in everyday life from their round of activities.

Intergenerational studies inquired into the possibility of a transfer of perceived well-being from one generation to the next and the impact of period, cohort and age factors. During this period, papers were also commissioned from fellow South African researchers specialising in crosscutting issues affecting quality of life such as poverty and inequality, health, crime and optimism (Møller, 1997)

This series of case studies served two purposes. They lent support to those of the trend study and they added depth to the trendlines by informing on the hopes and fears of South Africans and how such factors moderated well-being. We consistently found that groups higher up in the apartheid pecking order scored higher on life satisfaction than those lower down. The highest levels of dissatisfaction were found among the most disadvantaged and marginal groups in society who were disempowered by their lot in life. The unemployed typified the dissatisfied socially excluded. Extremely high levels of dissatisfaction were also observed among failed return migrants who had little to show for a lifetime of labour. Typically, mineworkers with tuberculosis were sent back to their rural areas of origin in mid-career. It is a dubious distinction for South African quality-of-life studies that the levels of satisfaction among marginal groups was so low as to be discredited by international scholars. For instance, Cummins (2000) felt obliged to exclude the case of South African return migrants from his review of income and subjective well-being. Grounds for exclusion were life satisfaction scores too low to be credible. Cummins argued that such low scores must surely be attributed to the abnormal circumstances obtaining in apartheid society. However, more recent South African studies continue to find extremely low levels of satisfaction among the unemployed while the rate of unemployment has risen to over 40 per cent in the new millennium.

III The Analytical Phase: Beyond The Descriptive

Exploring the factors underlying quality-of-life trends

In the course of the 1980s and 1990s, the key global indicators were inserted into all studies undertaken under the auspices of the South African Quality of Life Trends Project. Indicators of life satisfaction, happiness and optimism proved to be convenient, inexpensive and powerful tools to provide a common thread to monitor social change during South Africa's transition. While it proved difficult to find financial support for regular rounds of research using the 35 indicators, it was more feasible to raise funds to continue the trendline for these three indicators.

To play it safe, both indicators of happiness and life satisfaction were used in these studies. Initially, life satisfaction was considered the more policy-relevant measure as it is assumed to be based on cognition rather than emotion. However, the global indicators of happiness and life satisfaction measures are highly correlated and yield similar scores although happiness scores tend to be somewhat higher on average. For practical purposes, happiness and life satisfaction can be used interchangeably. If the length of the questionnaire and funding permitted, both measures were applied. In other instances, the choice of measure depended on whether a cognitive or affective evaluation would be preferred. It seemed more appropriate to apply a happiness rather than a satisfaction rating in the context of a study of symbolic facets of quality of life. For example, happiness appeared to capture post-election euphoria better than life satisfaction. Similarly, when exploring the impact of the 'rainbow nation' as civil religion in the new democracy, it seemed more appropriate to use the affect measure of happiness (Møller, Dickow and Harris, 1999; Dickow and Møller, 2002). In the context of community quality-of-life studies inquiring into the impact of service delivery for the enhancement of well-being in line with the election promises, indicators of consumer satisfaction were deemed most appropriate (Møller, 1996a;1996d; Møller and Jackson, 1997).

Now that we were satisfied that our indicators were valid and sufficiently sensitive to detect shifts in the popular mood, we felt justified in extending our research interests. In the 1990s our research focus shifted from the descriptive to the analytic.

Focus on the material, relational and symbolic dimensions of quality of life

Research into development takes cognisance of material, relational and symbolic dimensions. The quality of life studies for the South African trends project had incorporated such nuances into its criterion-level indicators. In the 1990s these dimensions became the focus of separate studies.

An obvious concern in the new democracy was the *material* aspect of quality of life. It became patently obvious that political freedom would not suffice to maintain the levels of happiness and satisfaction witnessed in the months following the first open elections. The material underpinnings of democracy were equally important. One thrust of our trends study focussed on delivery of basic services to the poor. Results from the Afrobarometer (2002) indicates that citizens of Southern African countries are more likely to associate democracy with material benefits than with the basic tenets of democracy such as regular elections, freedom of association and communication, and an independent press and judiciary. Qualitative research conducted in advance of a range of community studies suggested that levels of expectations had been raised by the election promises. For example, our research found that rural communities expected the government to provide a level of services usually found in cities at no cost to beneficiaries (Sotshongaye and Møller, 2000). An essay-writing competition among the youth highlighted the new material concerns of the post-struggle generation that aspired to emulate the lifestyles of their western peers (Leggett et al., 1997).

The implementation of the ambitious Reconstruction and Development Programme (RDP) had experienced a setback when the new government discovered that its coffers were almost empty and it would first have to achieve economic stability before attempting to raise the living standards of the poor. Nevertheless, in spite of this setback, most of the targets of building a million houses, and providing access to clean water and electricity for the poor were achieved within the first decade of democracy. One might expect habituation to set in with rising expectations – a factor to which economists attribute the lack of increase in happiness in spite of gains in affluence over time (Easterlin, 2003). So far, this appears not to be the case in South Africa. Significantly, our own community research as well as household surveys conducted by Statistics South Africa show that beneficiaries of basic services are consistently more satisfied with living conditions than non-beneficiaries in each income bracket (Møller, 1996a; Devey and Møller, 2002; Møller and Devey, 2003). However, findings from the first systematic community quality-of-life studies conducted in South Africa found that households with the highest levels of services rather than the more basic ones recommended by South Africa's Reconstruction and Development Programme were more satisfied than others (Møller, 2000; 2001a). The latest Statistics South Africa household survey which includes a personal satisfaction item will allow for an even more exacting test of whether material resources boosts happiness levels of the population under democracy. The 2002 survey identifies new beneficiaries of services such as electricity, and contrary to Statistics South Africa's former policy of collecting only objective indicators, the agency has recently asked users of select services to give satisfaction ratings.

The *relational* facet of quality of life emerges as a powerful factor in our quality-of-life studies among the youth and the elderly. For example, a study of educational achievement in three-generation households suggested that self-confidence and life satisfaction might be passed on from one generation to the next (Møller, 1995d). We found that if members of the older generation expressed high self-esteem, the younger generation was more likely to follow in their footsteps. The fact that government transfers to the poor are channelled through old-age pensions brings to the fore the power dynamics within households that impact on the material and subjective well-being of individual members. Respect relationships are particularly important in collectivist societies. According to qualitative survey evidence, the old-age pension increases the self-respect of the elderly which in turn enhances their personal well-being (Møller and Sotshongaye, 1996). However, the added responsibility of supporting a large number of dependents on their pension income detracts from their happiness. In a time of rising costs of living, the vast majority of rural black pensioners in one of South Africa's poorest provinces expressed dissatisfaction with life in a 2002 study (Møller & Ferreira, 2003).

The *symbolic* dimension of quality of life might be considered crucial in the phase of nation building following on South Africa's negotiated settlement. One of the rounds of research for the South African Quality of Life Trends Study took a closer look at achievements that inspired national pride including the new civil religion of the 'rainbow nation' promoted by the country's first democratically elected president (Dickow and Møller, 2002). This study found that South Africans subscribing to the ideal of the rainbow nation tended to be more satisfied and optimistic for the future. This was particularly the case among Afrikaners, who are the losers in the new political dispensation. Interestingly, sporting achievements competed with the rainbow nation as the factor that feeds South African self-esteem. One survey respondent remembers that he felt even more elated following South Africa's victory in the World Rugby Cup in 1995 than after the 1994 elections in which he voted for the first time (Møller and Dickow, 2001). Sport is such an important part of South African's lives that it plays an important role in politics and personal well-being. It is significant that South Africa sent its current and past president and Nobel peace prizewinners to bid for the Soccer World Cup to take place in South Africa in 2010. If South Africa were also to win the games, it is foreseeable that happiness levels of all South Africans might soar to ones seen only during the election euphoria of 1994.

South Africa's emergent black middle class

The focus of most studies undertaken during the 1980s and 1990s was on the ordinary person in the street who had been by and large voiceless. A new thrust of research under democracy concerns the appreciation of life among South Africa's emergent black middle class. In 1999, a survey was undertaken among a panel of elites to assess the social changes taking place in the country since the coming of democracy and their impact on the lives of ordinary citizens (Møller and Dickow, 2001). The elites included opinion leaders in academia, business, agriculture, health, education, development initiatives, politics, opinion polling, and the trade unions, among other. The information elicited from members of the panel informed a nationwide survey which formed another round of research for the South African Quality of Life Trends project. Until 1999, syndicated sample surveys produced too few cases of black respondents in the higher income groups to make meaningful comparisons between satisfaction levels among black and white higher income earners. A breakthrough occurred in the 1999 survey, the first to produce the required numbers. Results confirmed that black and white higher income earners score equally high in terms of life satisfaction (Møller, 1999a). In a later round of research in 2002 (Møller, 2004a), which inquired into subjective well-being, optimism and attitudes to democracy, black respondents with the highest material standard of living were compared with their rank-and-file counterparts and other income elites. There was evidence that the black elite were more optimistic about the future than any other group. Black elites also exhibited more tolerance with regard to attitudes to co-existence with other language and ethnic groups in society.

International comparisons

South Africa represented a unique case for quality-of-life studies in the 1980s when development was hampered by discrimination and restrictions that stunted community initiatives and the empowerment of individuals. Post-apartheid society still prides itself in its exceptional achievement and its miracle status after regaining a place in world society. However, in some quarters the measure of progress in building an open and democratic society should take international standards as reference criteria. A logical choice for further research in the new millennium was to compare quality of life trends with those in other transition countries.

For example, the states of the former Soviet Union provided a laboratory to inquire into the impact on subjective well-being of rapidly changing economic fortunes in the transition from a command to a liberal economy. The complex relationship between income and subjective well-being within and between societies over time has long held fascination for quality-of-life researchers. Russian researchers teamed up with ones in the Netherlands to test whether the top-down or bottom-up explanations of life satisfaction applied in the former Communist countries using data from a large panel study (Saris and Andreenkova, 2001; Schyns, 2001). These researchers were invited to undertake a similar exercise for our South African data. The South African trend study was conceived at a time when the bottom-up model was the dominant paradigm. The bottom-up model states that overall life satisfaction is the sum of satisfaction with all aspects of one's life. In the course of the 1980s, Alex Michalos' (1985) Multiple Discrepancy Theory started to cast doubts on the exclusive explanatory power of the bottom-up explanation. The top-down explanation which states that overall life satisfaction spills over onto various aspects of life might also be valid. In South Africa, the 'Mandela factor' and the extreme loyalty to the ruling party intimated that a 'feel good' factor might colour evaluations of all domains in the afterglow of independence, especially for the black majority. Indeed the special analysis applied to the data from the 1995 round of research for the South African quality-of-life study suggested that the top-down model might have greater explanatory power in the case of both black and white South Africans. Evaluation of life circumstances appeared to be determined more by expectations for the future than by current living conditions (Møller and Saris, 2001).

In the 1990s, South Africa regained a place in world society which opened up new opportunities for South African researchers to join international research efforts. With the backing of research partners in Europe, South Africa lobbied for the inclusion in Statistics South Africa's official annual household survey of select items from the Euromodule. South Africa's official household survey, together with the census, produces most of the country's statistics on living conditions. A first for South Africa, the 2002 General Household Survey includes the 'gold' standard eleven-point unlabelled satisfaction scale favoured by many contemporary quality-of-life researchers. A number of other items, including ones on anomia, match the Euromodule. The aim of the Euromodule is to compare quality of individual life and the quality of society among the older member countries in the European Union and new member countries who joined in May 2004 (Delhey et al., 2002). The addition of outliers, South Korea and South Africa, adds to the international flavour.

A further effort to compare South African appreciation of life with those of other countries refers to a trial run with an adapted version of the International Personal Wellbeing Index (Cummins et al., 2003). The index was applied in a focussed study on crime victims and their community and personal quality of life (Møller, 2004b).

IV The Future Research Agenda

Which direction should quality of life studies for South Africa take in future? To a large degree, the challenges facing the young democracy will define the future research agenda (Schlemmer and Møller, 1997).

Expectations among voters were raised by the election promises in the run-up to the national polls in 1994, 1999, and 2004. It could therefore be anticipated that reference standards might shift so that relative deprivation would depress subjective well-being in spite of the rising living standards and the opening of new opportunities for the majority of the population. So far, the only evidence we have is that households that have made material gains under democracy are more satisfied with their lot than others. However, the gap between rich and poor has increased since 1994. A task for future research will be to inquire more systematically into the reference standards used to appraise living conditions in the new era. A better understanding is needed of the manner in which relative deprivation and shifting reference standards affect personal well-being and perceptions of progress in achieving national development targets.

Certainly, one of the shortcomings of the South African Quality of Life Trends Study needs to be remedied. Launched some 25 years ago, the project was informed by the American rather than the European tradition. The result is a fairly narrow focus on the individual, an anomaly in a society emerging from a collectivist worldview. To date, assessment of the quality of South African society has been applied mainly in community quality-of-life studies and opinion polls covering controversial issues. Meanwhile, the government's ten year review and the third democratic elections in 2004 have focussed South African minds on the quality of society in which the good life can be achieved for the masses. Interestingly, in a country where opinions tend to be polarised, there appears to be consensus on the challenges facing South Africa in the next decade. There is agreement that solutions will have to be found to widespread poverty and inequality, crime and corruption, and the HIV/AIDS epidemic. These societal level issues will affect individual quality of life just as race relations cast a shadow on individual well-being in the past. Exploring the many factors still retarding human development in South Africa will occupy quality-of-life researchers for many years to come.

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