APPLICATIONS OF SUBJECTIVE WELL-BEING MEASURES IN QUALITY OF LIFE SURVEYS

SOUTH AFRICAN CASE STUDIES

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ABSTRACT

Social reports which seek to give a balanced picture of social life and social trends typically make extensive use of subjective indicators to complement objective indicators. Subjective measures capture popular reactions to the living conditions described by objective indicators. The paper charts in broad outline the development of the social indicators movement and makes a case for collecting subjective well-being (SWB) measures for social reports on South Africa. It is argued that quality of life studies conducted in plural societies undergoing rapid social change, such as South Africa, yield rich material for social reporting but also pose peculiar practical and methodological problems. Select South African examples are given of social surveys designed to elicit subjective well-being. Drawing on these examples, methodological issues are raised which pose a challenge to South African social scientists when designing quality of life surveys and interpreting results.

INTRODUCTION

All societies have an idea of the good life. This is often a taken-for-granted notion which usually includes prosperity, security, love and longevity in good health. At the national level, this can be translated into good government of major social institutions. In the past decades many countries have set themselves the task of defining national goals in terms of the good life for their citizens and setting time limits for achieving them. Uplifting the quality of life of the people has become a catchword in modern society which has captured the imagination of politicians and the general public. There is compelling evidence which suggests that personal and national development are linked (Inkeles and Diamond, 1980).

International watchdogs such as the organisations affiliated to the United Nations as well as private research organisations endeavour to monitor progress in achieving the ideal of the good life for world citizens. The OECD's Social Indicator Programme, the World Bank's Social Indicators of Development (SID), and the European Economic Community's Eurobarometer are examples. The most common economic indicators applied to assess comparative achievement are measures such as GNP and GDP or income per capita. The most widely used non-economic social indicators include infant mortality and life expectancy rates. Equivalent statistics are applied in the health, nutrition, housing, education and infrastructure spheres, representing the full spectrum of basic needs and what in modern society have come to be known as requisites for a decent standard of living.

Over the years general rules have been established concerning the usefulness of different types of objective measures. There is general agreement that **end** or **output** measures give a more realistic assessment of whether goods and services - the carriers of the good life - actually reach the people. For example, capital expenditure on education is considered to be less tangible proof that John and Jane are actually going to school than the number of school places per 1000 population, the percentage of the school age population enrolled in and actually attending school. Equally important are measures which reflect the discrepancies between input and output measures. They identify the

bottlenecks in the delivery system such as mismanagement, corruption, inefficiency or lethargy which retard progress (Knox, 1975).

Although some countries have a relatively high economic achievement, this may not necessarily mean that all sectors of the population partake of accumulated wealth. Objective inequality measures, such as the Gini coefficient, capture popular participation rates. For example, South Africa ranks among the middle income nations in terms of its GDP (Nattrass, 1983) but has one of the highest Gini coefficients indicating a very unequal distribution of wealth. South Africa, with a Gini coefficient of 66 ranks highest in a 57 country survey (Wilson and Ramphele 1989:18). By contrast, the Republic of China (ROC) has made remarkable progress in producing wealth while also reducing its Gini index from 15 in the 1950s to just over 4 in two decades and today scores better than the United States and Japan (Chang, 1987:8; Cooper, 1989:2).

NATIONAL SOCIAL INDICATORS

The major building blocks for international monitoring are the nation states which collect statistics for internal as well as external use. National level social reporting became extremely popular in developed countries during the 1970s. Social scientists welcomed the opportunity to collect data which they hoped would have a positive influence on national progress. The aim was to produce a detailed and balanced picture of living standards and life styles which could be updated on a regular basis for policy information purposes.

When the social indicators movement first started in the late 1960s, the western developed countries were in the forefront of quality of life research. However, since the end of the 1970s the momentum for social reporting has slowed down (Andrews et al., 1989). Understandably, when an economic downturn occurs, research budgets tend to be tight and less tangible research subjects such as social welfare and well-being may be neglected. There are, however, a few western countries which have sustained the grand social reporting tradition. West Germany's ZUMA, a social survey centre, which publishes information on social indicators on a regular basis, is one of these few (Zapf, 1980; 1987).

Today, the centre is ideally placed to capture the dynamics of the social and economic integration of the two Germanies. In a more specialised field Great Britain has conducted several time use studies which open a window on social values and life styles (Gershuny, 1989). Researchers have been able to draw on this data to compile a databank for comparative studies of changes in life styles.

The World Bank collects information on behalf of developing countries throughout the world for its Social Indicators of Development Report. Data collected from developing nations make rich contributions to our knowledge of how changing living standards influence life styles. Unfortunately, if financial support for social reporting is not always forthcoming in developed nations, then developing nations strapped for cash are even less inclined to set aside funds for regular and detailed social reporting exercises.

Nevertheless, there are firm indications that developing countries are increasingly showing an interest in conducting their own quality of life research. For example, since its inception in 1974 'Social Indicators Research', the international journal specialising in social indicators and quality of life research, has received a significantly increasing number of contributions from countries outside the United States, Canada, and Europe (Michalos, 1986:58).

Many of the first social reports on western countries were government commissioned or state supported. The projects were often very ambitious and unsustainable. They became victims of cuts in government spending, changes in national leadership or combinations of these. In some instances government or private agencies responsible for collecting and compiling statistical series discontinued their activities after mergers with other agencies. As a result many a baseline study had no follow-up and acquired the status of an historical document whose value depreciated with time.

With regard to the national climate conducive to social indicator research, one might tentatively assume that the ROC may be more fortunate than other countries because social well-being is one of the fundamental principles on which the republic was founded. For this

reason alone one might expect support and encouragement for social monitoring and quality of life research efforts. This appears to be the case.

THE CURRENT SITUATION

In the 1980s the grand design models of social reporting have given way to more modest and manageable research enterprises. The most successful longer term projects tend to deal with specific sectors of the population, for example, the very young, the very old, the rural population, and groups at risk of being deprived of the good life. Furthermore, discrete aspects of social life, such as family living, have become special projects, the raison d'etre for specialised agencies (Ferris, 1989).

The momentum of the social indicator movement of the 1970s may have been lost in some parts of the world. However, the conceptual and measurement tools which were developed during the first phase are applicable to current quality of life research underway in other social contexts. One of the major lessons learnt from the early social reporting ventures is that high quality, well researched reports can have a major impact if targeted properly. The social relevance of statistics, their significance for the good life, must become transparent. Similarly, social indicators in isolation may mean very little; it is the broad picture which reveals critical insights into quality of life. In short, technical reports setting out lists of social indicators may require a companion report which comments on the social consequences of the data collection. The meaning of social indicators for the public at large may be lost without adequate interpretation.

It is against this very brief and sketchy background of the social indicator movement that I should like to review some of the efforts underway in South Africa to capture the essence of quality of life and trends in achieving the good life for South Africans.

Nations poised at the threshold of change make interesting social laboratories for social indicators research. South Africa represents such a rich field of inquiry by virtue of its social and cultural diversity as

well as the rapid social change which it is currently undergoing. Conducting research in a plural society can be extremely rewarding from a methodological point of view. At the same time there are also many difficulties which must be overcome if these rewards are to be reaped.

By drawing on examples of quality of life research in which I have personally been involved and have insights, I should like to outline some of the methodological challenges faced by South African researchers. Some may be unique problems, others may have parallels in other research contexts.

A description of five case studies follows. The first four studies have been carried out, the fifth is a prospective study still in the planning stages. Many of the lessons learnt during the expansive phase of the social indicators movement were applied. A common feature of all the case studies introduced below is the application of the subjective dimension of quality of life, referred to in the literature as 'subjective well-being' or 'SWB'. SWB encompasses a broad range of multi- and single item measures of happiness, satisfaction, morale, personal or psychological adjustment, and balance between positive and negative affect.

SWB has many attractive features and advantages over objective measures. It is a powerful measure in that it represents a very direct assessment of living conditions at the user's end. In this sense it is an output measure. In a similar vein it might be argued that people themselves are the best judges of their life circumstances. Their assessments may in fact be closer to the mark, and therefore more 'objective' than an outsider or expert opinion.

FIVE SOUTH AFRICAN CASE STUDIES

The following five South African case studies serve as the basis for discussion of methodological issues:

Case Study 1
Trend study of South African quality of life, 1983/88.

The aim of the baseline study was to develop a comprehensive but limited set of indicators to capture perceived quality of life (Møller and Schlemmer, 1983). This was achieved through successive trials with satisfaction ratings of a wide range of aspects of life. A selection of some thirty satisfaction indicators was made after several trial rounds of research to refine the instrument. The final set of indicators covers major social domains shown to contribute to general happiness and satisfaction. So far the indicators have been applied in two cross-sectional nationwide surveys (Møller, 1989).

The 1983 baseline study was more expansive, the 1988 repeat study more focussed. The former included exemplary rural subsamples, the latter focussed exclusively on the urban population groups. The first baseline study also included objective indicators of basic need satisfaction in terms of nutrition, clothing, shelter, amenities in the home, access to infrastructure, education and employment. The follow-up study was limited to assessments of SWB in terms of overall and domain satisfactions and social background factors.

Case Study 2
Multi-dimensional study of South African seniors, 1990.

This study was initiated by the Human Sciences Research Council's Centre for Research on Ageing. It inquires into subjective well-being and aspects of health, levels of coping, living arrangements, financial security, and social integration (Møller and Ferreira, 1990). It is the first South African social survey of non-institutionalised senior citizens (60 years and over) conducted nationwide and includes an exemplary rural subsample. SWB was assessed by means of satisfaction and happiness ratings and a 'geriatric' scale (Diener, 1984).

The database is compiled from self reports and allows for comparisons across population groups, age cohorts, and rural-urban residence in the case of black seniors. The study was modelled

on the ASEAN studies of seniors to allow for international comparison.

Two further examples of completed studies have a narrower focus in terms of the sector of the population under study as well as the topic of study.

Case Study 3
Quality of life in unemployment, 1989.

This study concerns the black unemployed in three metropolitan areas (Møller, 1990). The research was conducted in two waves. The first wave, which involved a purposive sample, informed the second wave which employed an area-stratified probability sample. Subjective well-being and other personal reactions were related to life styles in unemployment and coping styles.

The first wave of research elicited reactions of the unemployed in semi-structured interview sessions similar to lengthy conversations of two to three hours. The main survey employed a highly structured questionnaire schedule calling for choices between fixed options or agreement versus disagreement with attitude statements. A range of affect measures as well as select measures developed for the trend study of quality of life were applied. Practical measures to alleviate psychological hardship were proposed on the basis of the survey findings. It was recommended that the unemployed be better integrated into social clubs and that trade unions be more supportive of the unemployed members in their constituencies. The study is intended to have an immediate policy impact and will not be extended.

Case Study 4
Spare time use and quality of life among black urban youth, 1989.

The fourth case study is the most specialised one; it looks into time use (Møller, 1992). Time use studies represent a new branch of quality of life studies. Time is universal and therefore considered to be an ideal comparative indicator (Gershuny, 1989). The link

between time use and well-being is given if one assumes that SWB feeds on the accumulation of time spent to meet needs and wants (Juster and Stafford, 1985; Juster and Courant, 1986). Each participant in the survey kept time budgets or diaries of personal events for a weekday (Monday to Thursday) and a weekend day (Friday to Saturday) and reported on lifestyles and a wide range of youth and leisure concerns.

Although conceived as basic research, the findings produced have practical policy implications. This study identified specific groups of young people at risk of underutilising leisure opportunities or suffering from excessive leisure constraints. Time use was compared with satisfactions gained from leisure activities and SWB.

Case Study 5

Future research: A peace monitor.

The prospective study aims to monitor the transition period in a particularly troubled region which has seen much political violence and crime over the past eight years. The intention is to relate perception of violence versus peace in the neighbourhood with individual anxiety levels and SWB in selected areas in the region. Indicators of perceived peace, anxiety and SWB and their interrelationships will be interpreted against the background of events in the neighbourhoods under study.

The proposed research is action oriented. It is envisaged that the monitor will engage participant neighbourhoods and key actors in the peace conciliation movement in the region. The monitoring process in itself is intended to provide a peace incentive. It is assumed that all parties concerned may wish to see peace return to their neighbourhoods in order that the region as a whole may regain its economic strength which has been adversely affected by the violence.

An attractive feature of the proposed peace monitor is that it will produce territorial indicators (Knox, 1975). The design allows for area as well as individual measures to be aggregated. This means

that the data collected for the peace monitor can be linked to other databases collected for the region and stored by means of a Geographic Information System (GIS) (Fincham and Krige, 1991).

METHODOLOGICAL ISSUES IN SOUTH AFRICAN QUALITY OF LIFE RESEARCH

South African quality of life research only commenced in the late 1970s after the seminal work on SWB had been completed in western countries (Andrews and Withey, 1976; Campbell, Converse and Rodgers, 1976; Larson, 1978). Therefore, methodological issues concern mainly the adaptation and application of conventional measures, research designs and methods which have been pioneered outside South Africa.

MEASUREMENT CHOICES

All four of the completed case studies employed one or more general SWB measures which performed well in the South African context. These measures were first tested in the baseline study of quality of life trends (Case Study 1). The literature confirms that the many measures in use tend to correlate well (Diener, 1984). Choice of one over the other is therefore mainly a matter of the purpose of the research and the population under study. For continuity and comparative purposes every attempt was made to use the same set of measures in all studies. Five point satisfaction scales were used throughout. The scores were collapsed below and above the midpoint to yield the values 'satisfied', 'neither/nor' and 'dissatisfied'.

In the quality of life trend study we elected to use satisfaction measures at the domain level (e.g. satisfaction with education, family life). Some quality of life researchers contend that happiness more closely reflects an emotional reaction; satisfaction, on the other hand, can be considered a cognitive judgmental assessment (McKennell, Atkinson, and Andrews, 1980; Abbey and Andrews, 1986). Thus, happiness and satisfaction represent heart and head reactions, respectively. As the main aim of the South African research was to alert policy makers to

public opinion rather than transient moods, we decided that satisfaction measures would serve our needs better than affect measures. We discovered that at the global level satisfaction measures appeared to discriminate better between the groups under study. As a rule South Africans seem to score higher on happiness than satisfaction measures. For purposes at hand the satisfaction choice appeared to be a good one.

There is an ongoing debate among SWB researchers as to whether well-being is influenced more by temperament than a person's external blessings (Tatarkiewicz, 1976). By using the satisfaction measure we endeavoured to exclude from our assessments the effects of personality traits which are presumed to be stable over time (Carp and Carp, 1983). The literature cites that even discounting stable external circumstances person factors probably account for only a small proportion of the variance in well-being. However, considering that we were conducting research in a rapidly changing environment and given our objective of social policy monitoring, we required an SWB measure divorced from disposition which would clearly register reactions to any changes in living conditions. A satisfaction measure appeared to be more rational and less close to the self than happiness and therefore more suited to critical judgments.

A further consideration directed our choice of SWB measures. We assumed equity considerations to be all-important in a socially divided society with an excessively high Gini score such as South Africa. A number of SWB theories postulate that well-being results from a comparison between a given standard and actual conditions. People may compare their conditions with their current needs, past situation, their friends and neighbours and other relevant persons, their rights and expectations and aspirations (Michalos, 1985). Social comparison, that is, comparison with relevant others has been found to be a particularly strong predictor (Diener, 1984). With cognitive satisfaction measures, one may expect social comparisons to be more conscious than with affective assessments. In our research we wished to make the mechanisms of comparison as transparent as possible. The satisfaction measure appeared to be a good choice from this point of view.

SOCIAL REPORTING: POSITIVE VERSUS NEGATIVE INDICATORS

We were faced with further dilemmas when it came to reporting on findings. In the interests of brevity and impact we decided to report summary statistics rather than distributions. Our second decision was to report percentages rather than average scores which would range from 1 to 5 as we had used 5 point scales in all our studies. Percentages were considered more readily understandable than scores which require explanation of ceiling and floor. The third question concerned an ethical issue. As the intention was to make optimal impact on public opinion and policy making, we were tempted to report on percentage dissatisfaction to emphasise grievances. By a stretch of the imagination persons dissatisfied could cover all those indicating that they were 'very dissatisfied', 'dissatisfied' without qualification or 'neither/nor'. In fact this division proved to be the optimal one from a statistical point of view (Møller, Schlemmer and du Toit, 1987). However, from an ethical point of view the inflated dissatisfaction measure would be misleading if not appropriately footnoted. In the end we decided to communicate the statistically sound and easy to understand but less forceful satisfaction percentages.

Reporting satisfactions rather than dissatisfactions conforms well with the aims of SWB research to redress the negative preoccupation with unhappiness and pathology in favour of a more positive perspective of well-being (Diener, 1984). Our positive reporting style may also have conveyed confidence that a solution would be found to redress unequal perceptions of quality of life among South Africans.

SOCIAL REPORTING: FORMATS

Decisions regarding reporting formats reflect a contentious issue in South African society. The conventional social reporting format produces estimates for the officially designated race groups, which is anathema to most South Africans (Wilson and Ramphele, 1989). Currently the fourfold division is a fairly accurate reflection of the major socio-economic divisions in South African society. When using

the conventional reporting format we were aware that the format would colour the straightforward and unambiguous message which we sought to communicate with satisfaction percentages. However, we felt we had little choice in the matter.

The racial breakdown feature was incorporated into the sample design of the comparative case studies, namely the quality of life trend study and the senior study (Case Studies 1 and 2). This design feature appeared to be particularly appropriate in the case of the senior study. The four race groups represent different stages of population development. The white population is an ageing population with some 8,7 percent over 65 years, while the black, coloured, and Indian population groups are youthful with only some 3 percent (3,0, 3,5 and 3,2, respectively) over 65 years. The study discovered that lifestyles in the black and white communities, which influence SWB, are a reflection of these demographic differences.

What are the prospects of revising comparative research designs and social reporting formats for future quality of life studies? It is envisaged that trend studies will continue to structure reporting along racial lines in the foreseeable future. At least until such time as crude racial divisions, which serve as proxies for class divisions, are overshadowed by other social distinctions which render race meaningless as a social ordering principle.

Reformatting would certainly represent an important benchmark for South African quality of life studies. One might predict that a revision of South Africa's social reporting formats may in itself become a critical social indicator, marking the coming of age of a more egalitarian society. For many South Africans for whom the current social reporting convention is offensive, the adoption of an alternative would be a sign of improvement in the quality of their lives.

DESIGN ISSUES: THE NEED FOR LONGITUDINAL STUDIES FOR SOUTH AFRICA

There is a dearth of longitudinal studies in South Africa in all fields

including quality of life and ageing (Lawton, 1989). Among the case studies outlined above only the quality of life study (Case Study 1) shows up trends which allow us better to disentangle the effects of period and personality dispositions on SWB. Even here trends are based on cross-sectional rather than panel data. No follow-up studies are envisaged to date for the senior (Case Study 2), unemployment (Case Study 3) and time use (Case Study 4) studies. However, the proposed peace monitor (Case Study 5) lends itself to a panel design, which would involve the questioning of the same individuals in the follow-up studies.

If realised, the peace monitor would probably represent the first longitudinal quality of life study in South Africa. The peace monitor aims to have practical social relevance. In this sense it is a quality of life study which could capture the imagination of the people. By the same token a highly visible survey creates practical design dilemmas.

Initially a panel design was envisaged for the peace monitor. Attrition was considered to be no more of a problem than usual. We reasoned that learning curves, which often present a problem in longitudinal studies, could be used to advantage in action research. If respondents learnt the socially desirable responses and adjusted their answers accordingly, the monitor might be seen to be influencing positive attitudes towards peaceful solutions for the region.

However, a more practical consideration argued against the use of a panel design. In view of the fact that results of the proposed peace monitor would be widely publicised, one could foresee that poll results would become an integral part of the peace campaign. The researchers feared that panel participants would be easier to identify than respondents selected at random for each follow-up survey, and were therefore liable to intimidation and victimisation in volatile areas. Concern for the physical safety of survey participants prompted researchers to abandon the idea of a panel design in favour of a cross-sectional one.

Telephonic interviews, which do not attract attention to field staff presence in the neighbourhood, might have saved the panel design.

However, telecommunication services do not extend to most peri-urban areas which are the scene of much of the violence. The installation of telephone points for survey purposes might have attracted more attention than personal visits from field staff. Furthermore face to face interviews are still the norm in survey research among the black population in South Africa. Therefore for practical reasons a cross-sectional study involving personal interviews was proposed for the peace monitor.

INTERPRETATION DILEMMAS

Social statistics only have the potential to become social indicators; they require interpretation. A number of excellent annual reviews of the South African situation are available which provide source materials for contextualising social indicators. The Race Relations Survey (South African Institute of Race Relations, 1990) is one such resource. The survey has been published annually since the late 1940s and may be considered a social report in its own right.

The interpretation of indicators is a hazardous occupation; it is even more so if the indicators concern a plural and deeply divided society. Findings from the case studies highlight the difficulties.

The First and Third World contrast is clearly evident in subjective quality of life data from South Africa (see Table 1). People in developed countries report SWB well above the mid-point of the scale. South African blacks in contrast to the general norm report SWB well below the mid-point. In the baseline quality of life study, being black in South Africa made a significant and independent negative contribution to SWB; that is, blacks compared to all other South Africans perceived their lives to be far less satisfactory than other South Africans.

There is little progress in evidence in the data collected for the first case study. If the quality of life of South Africans had improved during the five years between the 1983 and 1988 surveys, one would expect a significant increase in the percentages of black respondents indicating general satisfaction (see Tables 1 and 2) and specific satisfaction with various aspects of their lives (see Table 3) in 1988. This is not the case.

TABLE 1: SUBJECTIVE WELL-BEING: SOUTH AFRICAN CASE STUDIES

Percentages 'very satisfied' and 'satisfied'		Blacks		Coloureds		Indians		Whites	
		S	H	S	H	S	H	S	H
Case Study 1									
Quality of life trends	1983	48	53	81	80	89	88	89	93
	1988	32	38	77	83	77	83	82	92
Case Study 2	1990								
Seniors		39	45	91	87	78	79	90	90
Case Study 3	1989								
Unemployed blacks		9	16						
Case Study 4	1989								
Township youth		51	-						

S = Satisfaction with life as a whole.
H - Global happiness.

Sample sizes:

Case Study 1 1983/88	Blacks 1516/1199; Coloureds 970/829; Indians 1316/991; Whites 834/752
Case Study 2	Blacks 997; Coloureds 978; Indians 999; Whites 989
Case Study 3	Blacks 1051
Case Study 4	Blacks 1200

However, trend results show that the perceived quality of life has decreased for all South Africans. The satisfaction gradient across the race groups still reflects perfectly the socio-economic and political advantages. Nevertheless, the 1988 gradient is less sharp and the cleavages between the white, Indian and coloured groups appear to have decreased. At the same time, the polarisation between blacks and the other race groups increased. Being black in South Africa contributed significantly to depressed well-being in 1983 and the trend persists in 1988. In 1983 between 4 to 5 out of 10 blacks stated general satisfaction with their lives; in 1988 only 3 to 4 out of every 10.

A meaningful interpretation of quality of life trends must take into account survey artifacts (biases in measurement, response sets etc.), external factors (objective improvements or deterioration), and internal

factors (personal assessments and adjustment). Internal factors tend to confuse clear cut trends in that they dilute or enhance the impact of policy interventions on people's personal lives. People may adapt to better or worse conditions so that they do not register in their satisfaction judgments. Shifting reference standards cause problems for interpretation.

In South Africa in the 1980s, it is highly likely that equity or social justice considerations were the most significant reference standards for black South Africans. Objective improvements in life circumstances probably did not measure up to this exacting standard despite the reform measures which took place between 1983 and 1988. With the wisdom of hindsight, the dramatic shift in state policy introduced in February 1990 adds strength to this argument.

Interpreting the results from a cross-sectional study which contains few clues regarding shifts in expectation levels is hazardous. In 1983 the

TABLE 2: SUBJECTIVE WELL-BEING: SOUTH AFRICAN CASE STUDIES

Percentages indicating 'Life getting better' and 'Life is rewarding'		Blacks		Coloureds		Indians		Whites	
		B	R	B	R	B	R	B	R
Case Study 1									
Quality of life trends	1983	49	46	58	53	53	53	61	63
	1988	34	34	57	55	51	50	55	62
Case Study 3	1989								
Unemployed blacks		7	5						
Case Study 4	1989								
Township youth		63	50						

B = Life getting better (versus worse), 3 point scale.
R = Life is rewarding (versus frustrating), 3 point scale.

Sample sizes:

Case Study 1 1983/88	Blacks 1516/1199; Coloureds 970/829; Indians 1316/991; Whites 834/752
Case Study 3	Blacks 1051
Case Study 4	Blacks 1200

TABLE 3: QUALITY OF LIFE TRENDS IN SOUTH AFRICA: DOMAIN SATISFACTIONS (CASE STUDY 1)

Percentages perceiving themselves to be 'satisfied' or 'very satisfied'

	Whites		Indians		Coloureds		Blacks	
	1983	1988	1983	1988	1983	1988	1983	1988
n	834	752	1316	991	970	829	1516	1199
	%	%	%	%	%	%	%	%
DOMAINS OF LIVING								
Health								
Own health	91	88	90	82	92	83	67	51
Family health		89		65		71		64
Housing								
Own present dwelling	93	92	82	71	73	68	60	45
Size of dwelling	89	89	74	68	64	61	35	30
Availability of housing	65	80	57	50	43	40	33	29
Choice of where to live	89	89	69	59	57	61	50	43
Community facilities								
Public services	80	73	68	54	55	51	39	33
Transport costs	63	66	37	43	44	48	21	21
Security against crime	77	68	50	49	41	52	31	35
Family life								
Family happiness	93	91	94	89	92	84	83	76
Education								
Own education	71	74	65	60	52	64	39	26
Occupation								
Job opportunities	66	73	37	35	47	46	19	17
Independence at work	92	87	88	78	87	79	60	51
Treatment at work	92	88	89	77	86	81	61	52

Percentages perceiving themselves to be 'satisfied' or 'very satisfied'

	Whites		Indians		Coloureds		Blacks	
	1983	1988	1983	1988	1983	1988	1983	1988
n	834	752	1316	991	970	829	1516	1199
	%	%	%	%	%	%	%	%
Income								
Own wages/salary	70	59	55	44	57	47	26	15
Ability to provide for family	87	89	83	65	77	71	51	32
Insurance against illness/death	83	83	51	51	53	51	16	13
Income in old age	73	69	47	42	47	45	14	11
Food								
The food you eat	94	95	96	89	94	89	67	59
Socio-political issues								
Voting rights	90	93	31	48	20	44	27	19
Life compared with other race groups	84	85	68	68	50	60	30	27
Respect from other race groups	85	84	73	68	59	64	38	38
Race relations	90	90	80	79	70	80	40	36
Freedom of movement	96	90	76	68	68	71	48	36
Intimate, private and social life								
Yourself as a person	89	85	95	91	95	90	89	77
Respect in the community	93	91	91	90	85	85	64	60
Loyalty of friends	91	90	92	86	87	83	69	65
Peer group adjustment	92	92	94	92	94	91	72	76
Intimate relationships	94	92	90	83	89	81	75	71
Spare time activities	86	83	80	68	79	81	69	42
Fun in life	89	84	84	75	85	81	61	42

researchers sought an explanation for the depressed quality of life of blacks in their generally lower standard of living and social exclusion. The effects of measurement artifacts were dismissed in this interpretation. The fact that SWB measures were indeed sensitive to differences in SES type measures in the black subsamples strengthened our conviction (Møller and Schlemmer, 1989).

In 1988 a similar conclusion was reached that the drop in SWB was most probably caused by black expectations outstripping reforms. The more recent cross study comparisons given in Tables 1 and 2, which confirm the extremely low level of SWB measures among the economically deprived unemployed (see Case Study 3), lend support to the disadvantage explanation.

The senior quality of life study (Case Study 2) again recorded significant gaps in SWB between blacks and other groups. The trend was consistent for all measures of SWB employed including the geriatric ones. The SWB gradient closely paralleled self reported standard of living. However, this time researchers were less confident in accepting the straightforward black disadvantage interpretation.

In the baseline quality of life study (Case Study 1) self reports of social conditions were consistent with known facts. However, in the senior study black respondents' reports of ailments and lack of access to facilities appeared to be excessive although the broad picture again confirmed objective social conditions. This observation led to the speculation that gaps between white and black SWB and living circumstances might be exaggerated, subject to a systematic measurement bias which might be culturally defined.

The literature on SWB anticipates a cultural imperative which requires people to register happiness without regard to external factors. Although the evidence is encouraging regarding the reliability of self reports on happiness there is the possibility that people may label themselves or aspects of their lives as happy without due regard for their experiences (Diener, 1984).

The literature does not cover the opposite tendency for people to report

unhappiness with little regard for social conditions. However the literature did alert us to the fact that unravelling the myriad effects of response biases due to social desirability and adjustment is of particular importance with senior quality of life data (Herzog and Rodgers, 1986; Shmotkin, 1990).

The intriguing question is therefore whether the cultural explanation referring to what might be called a 'complaining' ethos, which was dismissed as a plausible explanation in earlier research (Møller, 1988; Møller and Schlemmer, 1989) should be reconsidered in the case of the senior data.

The 'complaining' ethos is probably a misconception; we argued that the more appropriate concept might refer to 'sharing' in terms of lifelong intergenerational support which is a common feature throughout Africa (Caldwell, 1982). The individual experience of a lifetime under apartheid for blacks and the diversity of lifestyles called for closer examination. We proposed that a broad conceptual distinction could be made between what we called a 'sharing' ethos and an 'independence' ethos. The first ethos is based on co-operation and intergenerational interdependence and reflects the more traditional modes of adjustment in later life. The second is rooted in the notion of self-reliance, which is akin to a more western modern style of adaptation and coping in later life.

We discovered that the two ethoses are evidenced in other data collected in the senior study relating to living arrangements, money management, and the social security provision of seniors. Among rural and urban blacks the social solidarity mode prevails with the emphasis on intergenerational financial support, nurture and care. The sharing ethos is perhaps best epitomised where the extended family system is intact and great respect is shown to seniors. Survey evidence suggested that white seniors subscribe to the second ethos. Independence appears to be the principle guiding their living arrangements, preparation for retirement, financial security and social integration.

We reasoned that the two contrasting ethoses might affect reporting styles among seniors. Quality of life research has discovered a general

tendency for seniors in western societies to report relatively higher levels of satisfaction than younger cohorts. Judging superficially from the case study data shown in Table 1, South African seniors appear to conform to world trends. However, differences between levels of SWB for black and white seniors within the sample by far exceed differences in SWB levels between cohorts of the same population groups. Black satisfaction levels are significantly lower than white levels.

One explanation advanced in the literature for above average levels of senior satisfaction is that seniors seek to conceal their disabilities and personal problems while overstating their coping abilities as a means of maintaining morale (Herzog and Rodgers, 1986). This explanation may well apply in the case of the white seniors in our study Denial is compatible with the independence ethos.

By contrast, a sharing ethos calls for people to confront the issues squarely, to air problems and concerns as a means of raising support and inviting mutual assistance in solving them. Where social disadvantage and a sharing ethos coincide, the issues tend to be exaggerated. This may be the case for the data profiles obtained from black seniors in our study.

A variation on this theme is suggested by Cattell (1990), who, drawing on research among rural elders in Kenya, attributes exaggeration of issues to the need to remind the younger generation of their social obligations towards the older generation. This response style draws attention to the societal ideals of the good life and the means of achieving them. The Kenyan ideal of the good life in the advanced stage of life is succinctly characterised as 'sitting and eating', an essentially nurturing concept referring to intergenerational dependency which is a common feature of old age security in many developing countries. Following Cattell's line of reasoning South African researchers may have mistakenly confused a complaining ethos with the normative imperative. Effectively, seniors may be using social indicators in the sense originally intended by the pioneers of the movement: namely to alert society to social welfare issues which need urgent attention.

This is not to dismiss lightly the interaction effects between disadvantage and reporting styles and the need to disentangle them. Certainly this is an important area for future research which will ensure greater precision in the interpretation of SWB results. Meanwhile any manifestations of the sharing ethos in South African quality of life results highlight social inequalities to good effect.

OUTLOOK: THE FUTURE OF SOCIAL INDICATORS IN THE FUTURE SOUTH AFRICA

In conclusion we turn to the question of the future of social reporting in South Africa. Will SWB measures continue to be useful tools for monitoring reactions to changing social conditions brought about by the new dispensation? The answer is probably yes. So far the local research experience is extremely encouraging. There are many different quality of life research applications, both basic and applied, which are appropriate for larger and smaller scale studies in South Africa. Some social action applications - the proposed peace monitor is one example - may be unique. Measures appear to be broadly discriminating in the local context and have face validity. As demonstrated in the case of the senior study, cross-cultural methodological effects, which pose problems for conventional interpretation, may even enhance the sensitivity of measures to deeply felt social ills which need to be addressed urgently. Worldwide there has been a shift from the original idea of social reporting with its emphasis on 'how things are' (objective indicators) to 'how things are seen to be' by the public (subjective indicators) (Vogel, 1989:443). Senior South Africans may be reminding us of 'how things ought to be' in South Africa by referring to normative reference standards.

According to widespread opinion the future South Africa aspires to be a truly non-racial and democratic society. It is highly likely that social reporting formats will change to reflect this transformation. We predict that the basic elements of social reporting, the social indicators - particularly those of the subjective variety which make known public opinion - will remain much the same and may be in even greater demand than hitherto. South Africans may become convinced that

social reporting is essential for national well-being. According to one expert viewpoint social reporting 'belongs to the democratic infrastructure and has a political function. It places welfare issues on the political agenda' (Vogel 1989:441). South Africans may well agree that social indicators have an important role to play in developing their society.

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