

Abstract

Changes in social policy in South Africa have resulted in the elderly being a major resource in society. This is a result of the South African government having shown its commitment to the elderly by operating a large-scale non-contributory social pension system. The Old Age Grant has become one of the primary sources of income for the elderly and their children in South Africa. This study uses qualitative data to examine co-operation between generations, especially wealth flow. The data for the study was sourced from focus groups and in-depth interviews that were conducted in South Africa. The focus groups were delineated according to youth, the middle aged and the elderly. Contrary to a widely held perception, the data presented in this study challenges the dominant discourse that sees older persons as passive recipients of care and economic support from younger generations. The results show that overall the net direction of economic wealth flow within households is not in favour of older people. Older people are disadvantaged in the emerging patterns of intergenerational economic relations, as majority of them continue to support younger generations financially.

1. Introduction

Studies of the elderly are quite common in first world countries because of the perceived strain to social security caused by the increase in the life expectancy and the dramatic decline in fertility levels in these areas. Until recently, ageing has not been seen as a priority research area in Africa. This is a result of the fact that Africa is a demographically young continent and the fact the elderly were generally thought to be adequately accommodated within the extended family. Although Africa remains a young continent, it has been noted recently that the cohort of older people is growing, both in absolute numbers and as a proportion of the population (Kinsella and Ferreira 1997). Against this background, three issues have been irking social commentators concerning older persons in Africa. First is the growing inadequacy of the extended family to take care of their ageing (Schreider and Knerr 2000), second is the lack of adequate social security provision in most African countries (United Nations 2003) and third is the growing burden of care that is heaped on the aged (Makiwane et al. 2004).

Historically the elderly in Africa were seen in a positive light and were expected to play positive roles in families and communities. Old age was generally seen to bring wisdom, thus was revered. For example in many African societies old people played the role of community counselors, and presided over community and family ceremonies (Nhongo 2004). There are also a number of

documented situations where the elderly played a leading role in societies in addition to being counselors. For instance, in South Africa during the colonial and apartheid era, old people played a crucial role in holding families together. Many young adults left for the cities while leaving their children with grandparents as the law did not allow them to bring their children. Older persons filled the gap of socializing and care for children left behind. In addition, many children born out of wedlock were usually taken care of by grandparents among South African Black families. Recently, with the advent of the AIDS pandemic, the role of older persons has become more pronounced, as many of them are taking care of sick young adults as well as orphans and vulnerable children (Spiegel et al. 1996, Makiwane et al. 2004). Thus, the thrust of this study is to describe the services rendered by old people to other generations in the contemporary South Africa.

2. Old age and residential arrangements in South Africa

Old age is seen in most societies as the time of life when people, because of physical decline, can no longer carry out their familial and societal roles. Thus, in the West, they are usually institutionalized and separated from the rest of the family. On one hand, this can afford old people the specialized care they deserve, while on the other hand they are ascribed an image of discarded people whom the society no longer wants. Until the present, majority of old people in Africa have been absorbed within the households of their children. Extended families become a source of full time care and monetary, physical and emotional support. This practice of younger generations caring for the elderly was one of the main building blocks of Caldwell's (1985) inter-generational wealth flow theory. Caldwell posited two wealth flow regimes, based almost entirely on his research of African societies. According to him, one wealth flow regime is found in "primitive" and "traditional" societies, where the wealth flow moves upwards from younger to older generations, and a contrasting wealth flow regime is to be found in developed societies where the net flow of wealth moves from the older to younger generations. Thus, Caldwell concluded, parents in traditional societies have a vested interest in giving birth to as many biological children as possible. As Caldwell explains, one of the main benefits of giving birth to children is adequate care during old age. He asserted that it would be the change of the direction of the wealth flow that would trigger fertility decline in "traditional" societies.

This paper challenges the dominant discourse which inspired Caldwell's theory. This discourse sees older persons as passive recipients of care and economic support from younger generations.

The data presented below shows that the role of older persons in families is more than has been acknowledged in the past. While older persons in contemporary Africa are overburdened with work to sustain younger generations, they are generally given little acknowledgement by society. A number of social changes in society have reinforced the role of older persons as a resource in South Africa, including modernisation, the migrant labour system, government financial support for the elderly and the AIDS pandemic.

3. Socio-Demographic features of older persons in South Africa

The population of older persons throughout the world is increasing at a very rapid rate. It is expected that the number of older persons will have reached the 2 billion mark by 2050. The elderly population in Africa is currently estimated to be slightly over 38 million, and is projected to reach between 203 and 212 million by 2050 (Help Age International: 2002). By 2050, the population aged 60 and above in South Africa will have increased from the current 3.7 million to 4.6 million or 13.7% of the total population. The ratio of older persons to the potentially economically active adult group will have increased to 14.9. The major concern of ageing in South Africa is not related to the increase in the number of older persons, but to the role which older persons are playing in households without being given due recognition.

Population ageing in South Africa has been accompanied by declining sex ratios, whereby a larger proportion of females are reaching old age than males. This has caused a higher proportion of households where the elderly reside, headed by women who have not traditionally been the breadwinners of African families. Higher age levels are associated with extremely low sex ratios, reflecting a higher mortality among males. The fact that majority of the elderly are women is generally a disadvantaging factor to the community of the aged. Cultural practices, which are still common in South Africa, can be discriminatory to women. These include women being excluded or limited in inheritances and having less say, within the family. In some areas of South Africa, accusations of witchcraft are generally leveled at older women, which can lead stigmatization and ostracisation and sometimes harm.

6. The impact of South African political history on current intergenerational relations

a) Modernisation and the family

European scholars were the first ones to explore the place of the family or household in the economic structures of various European societies. Scholars influenced by European thought tended to hold the view that the nuclear household, which was shown to be predominant in Europe, was the authentic and normal household form throughout the world. Most studies conducted so far on the structure and function of African families were pioneered by European scholars. Thus, a key theme in these studies was the African domestic group and the process of modernisation or industrialisation (see Goody, 1973).

Theoretical investigations of the families and households were influenced by meta discussions on the families and their place in the process of modernisation. Debates on the composition of households or families have evolved around exploring the relationship between modernisation and the composition of households and families in South Africa. In particular scholars have sought to explore how the incorporation of South African society into the world system of colonialism and later racial capitalist development affected household forms and function. Scholars have asked whether modernization was altering or changing the character of the African household, or whether the institution of the African family or household was able to resist the changes imposed by external forces, such as industrialisation of the society.

In Southern Africa there are two competing theoretical positions regarding the relationship between modern industrialisation and household or family forms. The first theoretical position on industrialisation and composition and structure of the African household is that as society transforms from traditional society to modernity, family and household patterns change accordingly (Steyn, 1993, Amoateng, 1998). One of the major aspects of this change is the disintegration of the extended family, resulting in a progressive failure to look after its ageing. The second view on this matter refutes the first. Scholars who subscribe to the contrary view hold that despite the economic and political situation, the African family or household retains the distinctive cultural properties that make it qualitatively different from its western counterpart (Russell, 1994; 2003; Spiegel, 1996).

b) Migrant labour and household dynamics

Empirical studies conducted on aspects surrounding to African urbanisation highlight the dehumanizing impact on family life of Africans of the migrant labour system. Jones (1993) has shown the suffering endured by children and adolescents from rural areas, who are left behind

to stay with their grandparents. The evidence that comes from studies of household dynamics in migrant hostels contradicts the view that modernisation or industrialisation tends towards the development of the nuclear family or household amongst the African population. Even in urban industrial contexts the extended family amongst the Africans continues to be the idealised family or household form.

Ramphele's work (1993) on life in the migrant hostels of Cape Town has relevance for our current study. It touches on the issues of intergenerational relations, as well as on the question of gender and social power in the household. As a result of the migration of males to the cities rural women especially the elderly had to rear children on their own, without the support of a male figure in the household. Some scholars have pointed out the economic and social effects on children in particular, of growing up in households or families in which the father figure is absent for prolonged periods of time and ageing women provide care (Richter & Morell, 2006).

State ideology, Social security and the care of children

The discussion of the role of the state in shaping intergenerational relations must take into account political and historical shifts. Much of what has been said about the effects of migrant labour on the African family or household could be attributed to the apartheid system. In South Africa, economic disparities between rural and urban households inherited from the apartheid past persist unrelentingly into the post-apartheid period. One of the indicators of this phenomenon is the scarcity of employment opportunities in rural areas, and the subsequent rural to urban migration which persist up to the present.

South Africa is one of the few Sub-Saharan countries that operate a non-contributory social pension system. The Old Age Grant is paid monthly to men and women who are 60 years and older, regardless whether or not the person worked previously. In South Africa, the scheme is 'means tested', meaning that it is given to elderly persons who either do not have any other regular income, or the level of the regular income they receive is below a minimum living level standard. The Old Age Grant (OAG) is the primary source of income for the majority of the elderly in South Africa. Furthermore, in many cases the elderly are likely to use their old age grants to support the entire household which is usually multigenerational (Makiwane et al. 2004). This is stemming from high youth mortality and unemployment, which forces many young people to be dependant on their ageing parents. South Africa has shown its commitment to the

care of older persons by sustaining the Old Age Grant in spite of many development challenges the country faces.

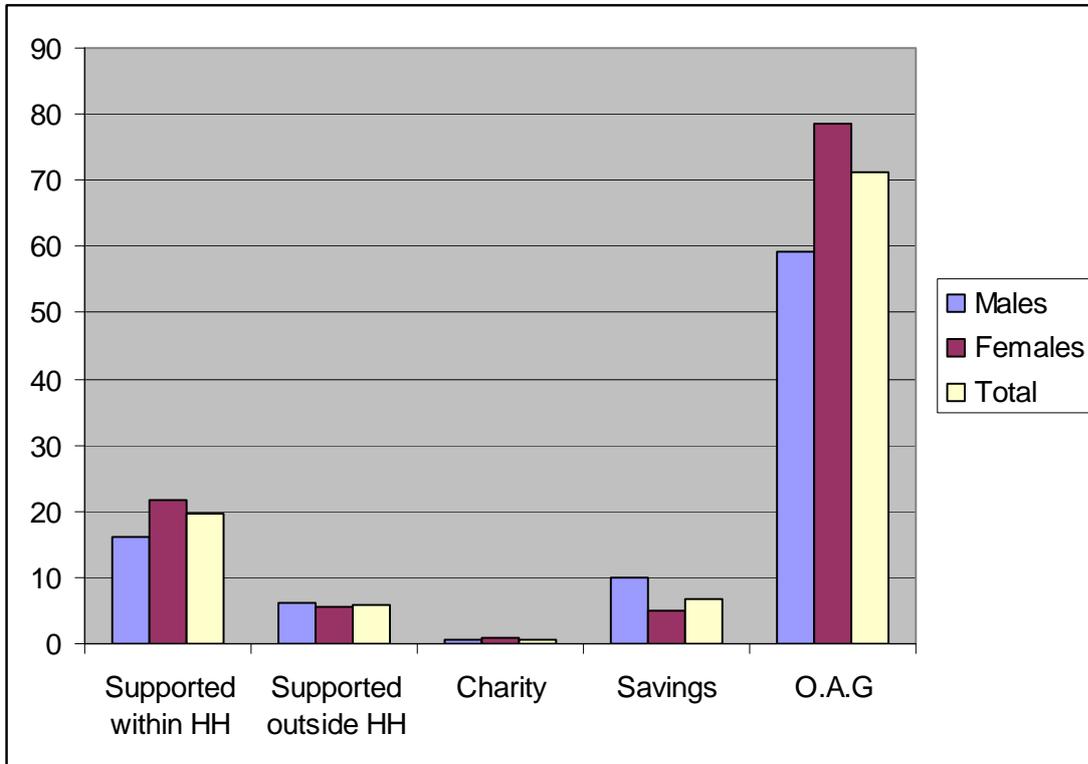
The Old Age Grant was introduced by the Apartheid government for the poor white elderly, but was later extended to the Black majority for a smaller amount than that given to their white counterparts. The social grants were equalised at the end of Apartheid. In addition the child support grant was introduced by the post apartheid state in order to alleviate poverty in poor households. Quite commonly, it is the grandparents as carers of grandchildren, who make claims on behalf of these children (Makiwane 2010).

The state grants that reach older persons have a profound effect on relations between generations. For instance, old age pensions operate as a very extensive and effective poverty alleviation scheme in South Africa. These are essentially distributive in nature; they reach more rural communities than urban and benefit more women than men. As a result, the Old Age Grant has assisted in enhancing the status of elderly, as they have become wage earners and breadwinners. According to Du Toit (1994), pensions in South Africa have enhanced the status of the elderly and reduced the progression towards their marginalisation which is common in countries that are undergoing social and economic change.

Some of the main expressions of solidarity between generations include economic transfers and caregiving from older generations to younger. Incidentally, the social grants are also sources of conflict. The study documents how generations share wealth between themselves.

The table below has been formulated from the General Households Survey, a series of national data set from the Statistics (SA) (2009). The analysis is based on a question which asked whether respondents have received any financial support in the past 12 months. The question lists a number of possible sources which include: persons resident within the household, persons outside the household, charity, faith-based or similar non governmental organisation, and government grants. The analysis only includes respondents who are 60 years and above.

Figure 1 The distribution of sources of economic resources received by to older persons in South Africa, by Gender



Data Source: Statssa, 2007

As shown above, Old Government Grants (O.A.G.) are by far the main source of income (70%) for many older persons. Besides O.A.G., there is little other financial support reaching older persons. Few older persons have amassed enough savings, to support them through their old age. This is reflected in the figure above, which shows that only about five percent of older persons are benefiting from savings. As can be expected, more males have access to savings during old age. This is a result of the fact that men are more likely to be in the formal labour market which enables them to save for retirement. Support from family is of special interest. About 20% of older persons get some support from within the household. Given that most older persons are staying in multigenerational households, this is an indication that there is an extremely low reciprocal support to older persons from other generations co-residing with them. Of more interest is the fact that a lower proportion of older persons receive financial resources from outside the household. Given that most children who are financially independent are more likely to have left the household, it would have been expected that they are sending regular

remittances to support struggling parents left with less successful siblings. As stated by Moller and Ferreira (1992), co-residing children who are financially able are more likely to support older persons than those who left the households, with the majority who are not financially successful being supported by older persons.

Intergenerational co-residence and the life course

Many white children grow up with their parents in two generational households. As young adults, they are more likely to live in one-generational households as a result of moving out of childhood households and delaying childbearing. This is disrupted when they start having children, but will later revert to one-generational households after their own children have gone past teenage years and moved out. As shown in the table below, as many as 78% of white people aged 60 and beyond stay in a one generational household. The table below is based on the analysis of the respondents' households in the 2007 Community Survey.

Table 1 Percentages of Co-residence by age groups in South Africa

Household Type	Age Groups					
	Whites			Black		
	18-34	35-59	60+	18-34	35-59	60+
One generational household	54.8	35.6	78.3	59.9	28.7	18.9
Two generational household	43.0	59.0	15.3	37.7	46.1	14.8
Three generational household	1.7	4.2	4.3	1.2	20.4	41.2
Skip generational household	0.1	0.5	1.9	0.6	3.4	24.0

Data sourced from Statssa, 2007

Contrary to the trend among older white persons, older Black persons are more likely to reside in multi-generational household (81.1%) than during their working ages. A common practise for older persons in Africa, who has moved away from extended family because of employment commitments, is to rejoin extended families once they have reached pensionable age. Another reason for most African older persons to reside in three generational households is the number

of young people who never left parental households and have subsequently given birth to children.

Results from qualitative interviews

The data was sourced from focus group interviews conducted around Gauteng (one of the nine South African Provinces) as a pilot study of intergenerational relations in South Africa. There are three generations delineated according to this study: the youth (15yrs – 24yrs) the middle aged (25yrs – 59yrs) and the elderly (60+ yrs). The questions administered probed issues around the following topics:

- Main source of income for the elderly
- Other secondary sources of income
- How many people are supported with the income
- The main patterns of expenditure
- Who benefits most from grandparents income

Main source of income for the elderly

Almost all groups of interviewees said “Old Age Pensions” are the main source of income for the elderly. Besides mentioning “pensions”, the middle income youth also said, “some (elderly persons) work” and added that, “some children support them because they (the children) work”.

Who benefit most from the older people’s old age grants?

A group of middle income elderly mentioned that, “Some of us do not have income, we have lost jobs and we have kids to support, (and) thus depend on the pension grants received by the elderly”. Thus in addition to pension supporting older persons it is used to support for younger generations in multigenerational households. Older persons, said, “We support our children, they do not have any other source of income.”

Some middle income elderly noted, “The children are the ones we need to maintain. I do not benefit much”. Other low income elderly said, “I think the dependents benefit the most from you

as a pensioner". Another in the group say, "(It's) the young ones." Young people affirmed this saying, "The money benefits us the most". "The grannies benefit, but we also benefit. They buy what they want but they also buy for us and our children. If we have money we send them, but generally it is not enough for monthly basic necessities. Thus we all benefit from grandmothers pension. If we can lose the pension money we can all go hungry".

The secondary source of income

Other elderly persons mentioned "other social grants" as secondary income (mainly the Child Support Grant). The high income youth mentioned that the elderly get secondary income "from family, they get money from their daughters, especially if they look after their children, the parents (of the children i.e. their daughters) can give money." One group of youth said from, "children and grand children." A group of low income middle aged mentioned "small businesses". This view got support from a middle income youth who are of the opinion that, "If they (the elderly) are not self employed they run a business or something."

The secondary source of income for the elderly is seen as:

- Nonexistent in majority of cases
- Coming from family members, especially daughters who keep children with the grand parents received specific mention.
- From small self employment businesses
- Secondary government grants like child support grant.

Do children send monthly remittances to their parents?

This question elicited interesting and varied responses. The majority of middle income elderly claimed that they do not get remittances from their children. They said, "These children cannot get jobs after graduation because when they go to look for jobs employers need experience." One respondent said, "The children you know them, even if they are working will not give you money". He ended his sentence by throwing a sarcastic rhetoric at the interviewer, saying, "Maybe you give your father money". But there were parents who conceded that they did get some remittance although it was not enough, "Their (grand children's) mother works far away and also try to contribute but it is not enough." The low income middle aged and the youth saw this from another perspective. Youth had different personal opinions on the matter. One young

woman said, "In some places children give the elderly money. In my case I try to save money for them". In the same group another lady vehemently opposed this view saying, "It depends on the situation - what about if they use the money for drugs and alcohol." Then she became personal and said, "I don't give my parents money." A group of low income middle aged said, "Yes (we send remittances) because they can't survive on the pension only". It seems that this money is mainly sent to support children whom they leave with the elderly, because the same group later on said, "We give birth to children and we leave them with our mothers".

The question of remittances is a contested terrain, but the picture that is formed from the qualitative interviews is that:

- Many elderly do not receive remittances. Some grandparents get regular monetary support from working children who leave their own children with grandparents. Even in this case, many older people state that this is not enough.
- It appears that there are few educated children who support their grandparents; the exemplary exception is the lady who quotes that she personally saves for her grandparents. There may be a few who act similarly who belong to the group of the high income youth.
- The question of unemployment of their children is raised by poor and middle income elderly quite often. It is a reality in contemporary South Africa that a good proportion of young people are unemployed. This contributes to the situation whereby children and grandchildren cannot remit monies to parents.
- It seems the poor and their children are trapped in the poverty cycle. The poor send children to school but the children do not get relevant skills to enter the labour market and hence they remain unemployed in spite of qualifications. The children of high income households and some from middle income households are more likely to be successful in gaining employment.

Do you quarrel on how remittances should be spent?

The majority of respondents said that there are quarrels and they went to assert the reasons for these. A group of middle income elderly noted; 'Yes', and gave the following reasons: "The young generation knows nothing about how to spend money because why – you see now, I am still working. I have grown up kids – my last child is 64 years and if I give him R100-00 and within two hours it will be finished....".

The response of the high income youth was “Yes there is conflict sometime, especially if parents use the money to drink alcohol. It all depends on what they use it for. If they spend it on alcohol there is no use of giving them the money”. This view was supported by the middle income youth who said: “Yes. If you give money for something and they use it for something else that creates conflict.” The low income middle age also tended to concur: “Yes. You will get stories that things you instructed them to do with the money have not been done. You ask why and they say they have committed the money elsewhere”.

But one group of the low income elderly had opposing views. They said that there are no quarrels, “We just use money as we please. There are many people who (neither) have jobs and (nor) get pension money. They are very poor and they suffer terribly because they do not have the necessary documents to be able to apply for the pension money. The only money they get is from their children’s grants money, which is only R200 for each child and still not enough for their needs.” As the above quotations indicate remittances are generally tightly controlled and monitored or watched by the donors and as a result they are a source of intergenerational conflicts.

Who takes care of the sick elderly, of the parents and of the grandchildren?

Middle income elderly said “Sick adults are sent back to the villages – hospitals are expensive because you have to pay for the bed. Few manage to go hospitals.” Another group of middle income older persons noted, “..a sick person is cared for by an older person because the younger generation do not have the patience to care for the sick. My first born when an elderly person is sick he would ask, why does he not die? (That is) my own son”. Other older people have expressed that spouses take care of one another “Me and my husband take care of each other”. Some said, “We take care of ourselves”. High income youth said, “Old age homes, a few are take care by their children”.

Who does the house chores?

Middle income elderly said; “We all do it.” One man in the group goes out to illustrate, “If my wife has somewhere to go, say Johannesburg, I will clean the house because I do not have many friends, my friend is my wife”. Another concurred, “Ha my sister, you see I grew up with my grandmother you know me, my wife is also working still, so we all clean, cook”.

On the other hand, the question was answered in different ways by the low income elderly persons; some said, “We do the chores ourselves”, while others indicate that they do part thereof, “we do it when the children are not at home, and when they are at school’. Others said, “We share the chores with the kids”.

Among the high income youth the question elicited the following responses; “(the chores are done by) our parents.” Others said they (the children) do them because, “Our parents do much for us we are rewarding for the good done to us”. The responses of the middle income youth were: they are done by our, “mothers, sometimes it’s me.” One said, “The mother cooks, the father does the garden. Everybody knows what to do in order for the house to run.”

The low income middle aged said, “We do the house chores on our own”. The evidence shows that in many homes the parents or grandparents carry the bulk of the responsibility for doing the household chores; but then in many too, the children do help or have their own chores.

Emerging trends in perspectives and experiences of intergenerational relations at the household levels

About Economic Flow of Wealth

From the experiences of participants in our study, we found **two general models** of wealth flow in intergenerational relations.

The economically stable model

Wealth flows from parent to children when the children are young; followed by a long period of lull when children are working and do not usually need their parents money; they a period of windfall, when wealth ultimately flows from parents to children in the form of inheritance. This model is characteristic of sub-groups of the South African population that have been fairly economically stable over two or more generations.

- *Economically vulnerable model*

Wealth flows from parents to children when children are young. There is a significant flow of wealth in the same direction when children have become adults (- when children are jobless, support of

grandchildren, etc.). Ultimately, there is a period of non-flow from parents to children when the parents die (usually because the parents are not economically stable enough to leave behind any significant inheritance in cash or assets).

In summary, we found that overall, the net direction of flow of economic wealth within the household is not in favour of older people. Older people appear to be disadvantaged in the emerging patterns of intergenerational economic relations in the household.

Government pensions play a central role in intergenerational flow of wealth. In this regard, non-contributory old age pensions are reorganizing the patterns of economic relations and expectations at the household level. In expression of solidarity in intergenerational household relationship, older people tend to rationalize this imbalance in the flow of wealth. First, they see the future of their children and grandchildren as more important than theirs and therefore worth whatever it cost them even at their advanced ages. Secondly, they see their contributions to their children and grandchildren (even at the expense of their material convenience) as means of gaining relevance and acceptance in the household.

About Co-residence and Social Relationship

Main findings

Generally, as in economic relations, older people are disadvantaged in intergenerational social relations. Many older people are prone to oblige perhaps too readily in matters about intergenerational social expectations and relations, unless of course in extreme emergency situations where their preferences are not required or unobtainable. We found that practically, demographic factors that affect patterns of intergenerational co-residence include marriage, migration, household age and gender structure. Female children, and unmarried children and children who are struggling to climb the social ladder are more likely to co-reside with their parents. Intergenerational co-residence appears to be important for social and health status of older persons. At the same time, many older persons recognize the pressure that intergenerational co-residence can exert on the social and economic lives of their children and grandchildren. Some older persons, especially of higher income levels, prefer regular contact in the form of short visits from children and grandchildren, regular symbolic material gifts, and for the more affluent older persons, regular communication by telephones and emails. We found that, predominantly, public perceptions of the status and roles of older persons are positive. However, it is not always clear to

people how best the household, community or even the government can translate this public goodwill into practical norms and actions to improve the quality of social life for older people. Many older people are reluctant to verbalize their preferences in definitive terms; however those who expressed preference would go for inclusive social participation. They wish to be seen as an important and participating sub-group of South African society, not merely as a marginal group to be confined to a home or merely be cared for.

FOLLOW-UP RESEARCH

Although the academic component of this study is not the focus of our discussion here, from what we are finding we have identified a number of areas that require further immediate research as a follow-up for our investigation, subject to availability of financial support.

How universal are these findings for all of South Africa?

This is a critical but easily resolvable question. Our study requires replication in other eight South African provinces in order to give a definitive national picture of the results we present here. With information collected from all provinces, this project could be a guide for a nationally representative quantitative study of older people which will serve as an authoritative baseline for monitoring changes and progress in the quality of life for older people in South Africa.

Collaborations in support of older people.

Studies should address issues about the present and future role of the State in support of older people. How viable is the role of the State? In one way or another, the family, the community and formal private sector institutions have roles to play. Explorations of best models for collaborative support for older people in the society should be an area of research priority.

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