

Migration and remittances in South Africa

**Background document on migration and first set of draft
questions for inclusion in the National Income Dynamics Study**

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December 2006

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1. Introduction

Migration, at the broadest level, involves the movement of individuals over space and the change of an individual's place of residence. This general definition encompasses many different kinds of migration. Migration may be involuntary, where individuals or households are forced to move (for example, in response to forced removals or evictions) or it may be voluntary, where people "choose" to move. Migration may be internal, where people move within the country, or it may be international with people changing their country of residence. Migration may also be permanent because it implies a permanent change of residency, or it may be temporary in that migrants retain membership in their household (or country) of origin, to which they expect to return at some point in the future.

Understanding migration, why it occurs and its implications, is particularly important in South Africa. Historically, the movement of people from rural to urban areas in the country was an integral part of labour market participation and of individual and household livelihood strategies. Much of this migration occurred under specific institutional conditions that made permanent urban settlement impossible for most migrants, and that led to a high prevalence of temporary or circular individual (labour) migration. Although restrictions on the movement and settlement of people within South Africa were lifted twenty years ago, research suggests that patterns of temporary migration persist, and that significant proportions of households remain reliant on remittances sent by migrants.

Our objectives in this background document on migration in South Africa are fourfold: first, to identify some of the key research questions that inform studies of migration; second, to review the data currently available in South Africa to investigate different kinds of migration, both at the cross-section and over time; third, to summarise what we know about migration in the country, specifically in the post-apartheid period; and fourth to highlight how our knowledge would be deepened with the availability of longitudinal data on migration. We use this background document then to inform a draft set of questions on migration for possible inclusion in the National Income Dynamics Study (NIDS).

In our review, we suggest that migration has been relatively under-researched in post-apartheid South Africa, particularly among economists. One explanation for this is the paucity of adequate, nationally representative data that have been available to explore patterns and trends in migration. Although the last decade has witnessed a dramatic increase in national data sets for socio-economic study, migration has not had a strong focus in this data collection. There are significant gaps in migration data and considerable scope to improve how information on migration is captured at the cross-sectional level. However, we show also that there are a number of key migration questions that can only be answered using panel or longitudinal data. The very nature of migration, which involves the movement of people across place, means also that the collection of good migration data is a surveying challenge.

2. What we would like to know about migration in post-apartheid South Africa? Some key research questions

The main questions that feature in migration research concern the reasons for migration, the destination of migration and the consequences of migration. Some of the key specific research questions include:

1) Who is migrating, or what are the individual- and household-level correlates of migration? For example, are migrants more likely than others to be young, more educated and single (i.e. is migration an important component of the school to work transition)? What distinguishes temporary labour migrants from permanent migrants? Are there differences in the characteristics of internal and international migrants? Is migration occurring from richer or poorer households?

2) Why is migration occurring? For example, are individuals migrating principally for employment reasons (to take up or to find employment), to join a partner, or to gain better access to services and infrastructure (such as health, schooling for children and housing)?

3) Where are people migrating from, and where are they migrating to? For example, is most internal migration from rural areas to urban areas in the country? Is there evidence of step-wise migration in South Africa?

4) What households are people migrating to and why? Do migrants join existing households, and if so for how long, or do they form new households? How is household formation/reformation linked to migration?

5) What kinds of ties do migrants retain with their households of origin and why? For example, which labour migrants remit income; do migrants remit more to immediate family members and in response to economic need; are remittances sustained over time and if so, under what circumstances?

6) What are the implications of migration for those who remain behind? How does labour migration affect the sending household's access to resources and income inequality in the sending area more generally?

7) What are the implications of migration for those who migrate? For example, how do the earnings and employment opportunities of labour migrants compare to those of non-migrants in both the destination and sending areas? How does the economic status of the migrant change through migration? How does the migration of children affect their progress through school?

8) Is temporary migration a precursor to permanent migration? For example, do labour migrants who retain membership in their household of origin return to this household after a period of time? Or do they end up settling permanently in their area of employment and why?

3. What data are currently available to investigate migration in South Africa?

We begin our review by summarising and evaluating the main sources of cross-sectional and panel data currently available in South Africa to study migration, and labour migration more specifically. In the subsequent section, we outline how these data have been used in studies of migration, highlighting key findings.

The cross-sectional data sets that we review are the:

- Population Census of 1996 and 2001
- October Household Surveys (OHS) from 1995 to 1999
- Labour Force Surveys (LFS) 2-12 (i.e. from September 2000 to September 2005)¹
- Project for Statistics on Living Standards and Development (PSLSD) of 1993.

The panel data sets that we review (all of which are regionally specific), are the:

- KwaZulu-Natal Income Dynamics Survey (KIDS) of 1998 and 2004
- Cape Area Panel Study (CAPS) waves of 2002, 2003/2004, 2005 and 2006
- Agincourt Demographic Surveillance Site (DSS) data collected from 1992.

We start here by looking at what information has been collected in these surveys on labour migration, remittances and migrant characteristics in particular, and then we look at the more general migration data that are available. Only the main methods of data collection, and the problems with these, will be highlighted in the text, while the details are contained in the Appendix (where the questions asked in all the surveys reviewed are presented in a table, organised along the themes of household definition, general migration, labour migration in particular, remittances and migrant characteristics).

In all of the surveys reviewed the household is the initial unit of enumeration. How the **household** is defined at the outset therefore is central to the type of information that can be collected on the migration of both households and the individuals who belong to them. This is particularly the case with labour migrants who may be living with another household at their destination for most of the year, but who may still be considered (by the household of origin and by the migrant) as part of the household of origin. To avoid the problem of double-counting individuals who consider themselves members of at least two households, most surveys specify a definition of the household as well as a (more specific) residency requirement.

The Censuses of 1996 and 2001 follow the practice of recording in the household roster all people who are present on the night of the census. To establish residency, the questionnaire then asks whether each person recorded "usually" lives in the dwelling, that is, for at least four nights a week. Of course, there may be many reasons as to why a person would be recorded in a household on the night of the Census other than that they are part of two households. So another question is necessary to identify

¹ The General Household Surveys (GHS) from 2002 to 2005, also conducted by Statistics South Africa (SSA), contain no questions on (labour) migration or remittances.

labour migration in particular, which also involves stipulating a period away from home that is long enough for the labour migrant to no longer be considered 'resident'.

Only the 1996 Census included such a question, where for each person recorded in the household on Census night, information was collected on whether the person is a migrant worker, defined as someone who is absent for more than a month each year to work or to seek work. This question, combined with the question on usual place of residence, allows us to identify migrants in their destination household. We could also capture migrants at the household of origin if they were visiting this household on Census night, but this is likely to represent only a small proportion of migrant workers. The 1996 Census therefore includes an additional question to capture migrants at their household of origin: "Are there any persons who are usually members of this household, but who are away for a month or more because they are migrant workers? (A migrant worker is someone who is absent from home for more than a month each year to work or to seek work.)".

The OHSs collect information in the household roster on "every person who normally resides at least 4 nights a week in this household", with the exception of the OHS 1996 which defined the household more specifically as "a person or a group of persons who live together at least four nights a week at the same address, eat together and share resources".

To identify labour migration in the OHS 1995, a question is asked for everyone listed in the household roster on whether he/she is "a migrant worker (that is a person working or looking for work away from what they consider 'home')". This captures labour migrants in their *destination* households. In the rest of the OHSs (1996-1999), migrants are identified at their households of origin through a separate module included in the questionnaire on labour migration and migrant characteristics specifically. The person responding on behalf of the household is asked whether there are any persons who are usually regarded as members of the household but who are away because they are migrant workers, defined (as in the Census) as someone away from home for a month or more each year to work or look for work.²

The LFSs 2 - 12 use a similar definition of the household as in the OHSs, but with slightly different wording: "Has stayed here for at least four nights on average *per week during the last four weeks?*"³ A separate module on migrant workers, which captures them in the household of origin (as in the OHSs), was only introduced in the LFS 6 (September 2002), and since then, repeated in the yearly September rounds (i.e. LFSs 8, 10 and 12). The definition used in the LFS 6 and 8 is again similar to that used in the Census and OHSs (i.e. someone who is absent from home for a month or more to work or to see work), but in the LFS 10 and 12, the definition of a migrant worker was reworded in a rather confusing way. The preamble to the first question reads: "This section covers information on migrant workers (persons who are separated from the household for more than 5 days on average a week in the past 4

² The wording of this question varies slightly across the OHSs, but the definition is essentially the same.

³ If the answer to this question is 'no', an instruction to the interviewer states in capitals "END OF QUESTIONS FOR THIS PERSON". If the interviewer followed this definition strictly, it could mean that someone who was away on holiday for a full month, for example, would not be captured as part of the household.

weeks)," while the question itself reads: "Are there any persons who are usually regarded as members of this household, but who are usually away for a month or more because they are migrant workers?"

The PSLSD of 1993 uses a very different method of defining the household, residency, and in turn, labour migration, than is used in Statistics South Africa's census and household surveys. In the PSLSD, individuals are included in the household roster if they meet all three of the following criteria: "(i) They live under this 'roof' or within the same compound/homestead/stand *at least 15 days* out of the past year *and* (ii) When they are together they share food from a common source *and* (iii) They contribute to or share in a common resource pool". Key demographic information is then collected on all these individuals in the first section of the questionnaire. More detailed information in the remainder of the questionnaire is collected only for 'resident' members of the household, defined as persons who have "lived under this roof for more than 15 days of the last 30 days".⁴ This approach eliminates the problem of counting individuals at more than one household, while it also minimises the possibility of reporting errors, given that respondents are unlikely to be able to give accurate information (other than key demographic characteristics) on non-resident members who are away for most of the year (Posel, 2003).⁵

In the PSLSD 1993, migrant workers can then be identified by the researcher through two additional questions on i) how many months the person spent away from the household in the last 12 months, and ii) the reason for his/her absence. The first two options given in the codelist for the latter question are "Employment" and "Looking for employment", which allows us to distinguish labour migrants from other temporary migrants who may have been away during the year (see the Appendix for the full codelist).

Unfortunately, the subsequent panel waves in KwaZulu-Natal (i.e. the KIDS 1998 and 2004) did not include these two questions. While the household definition and residency requirement are the same as in the PSLSD, it is no longer possible to distinguish between labour migrants specifically and other absent household members recorded in the household roster.⁶

The CAPS panel survey, which follows a sample of young adults aged 14 to 22 years in Cape Town and their households, captures individuals on the household roster in a more subjective way by asking that respondents "tell (the interviewer) the names of the people who usually live in this household". A note to the interviewer then states: "If unsure then note that 'usually live here' means the person has lived under this roof for more than 15 days of the last 30 days". While this could eliminate the problem of excluding those who were away on holiday, for example, in the previous month, it introduces the possibility that respondents might have interpreted 'usually' in different

⁴ Unfortunately, as with the LFS, if the interviewer strictly followed the definition of residency, then someone who had been away for the previous 15 days on holiday, for example, would have no further information collected on him/her.

⁵ For example, would the household of origin be able to provide information on the migrant's total earnings or employment conditions?

⁶ In a later module, it is possible to identify non-resident and non-household individuals who send remittances to the household in question, but not all of these individuals who make a financial contribution to the household will be labour migrants, not all labour migrants would necessarily be employed, and even if employed, would send remittances.

ways at first (some may have included labour migrants, for instance, in the list).⁷ This practice was not continued in subsequent waves of the panel, and the residency requirement was instead read out as part of the initial question.

No questions are included on labour migration specifically in Wave 1 of CAPS, but the technical document on the survey notes that there is unlikely to be much migration *from* Cape Town; rather the city is a destination *to* which migration would occur (Lam et al, 2005). In subsequent waves of the panel, however, where young adults are followed to new places of residence, it is possible to identify through a series of questions whether they moved to work or to look for work, and with whom.

Although the data are not available publicly, a brief mention of the Agincourt DSS is worthwhile here. The Agincourt questionnaire uses a very broad definition of the household (broader even than in the PSLSD), which includes people in the household roster who were resident for at least *one night* in the twelve months prior to the survey and who eat out of the same pot. In a similar manner to the PSLSD, information is then collected on the number of months each individual was away from the household and the reason for his/her absence. Permanent household members are required to have lived in the household for between 6 and 12 months (in other words, most of their time), while labour migrants are defined as those who were present for less than 6 months of the year for work-related reasons.

Some important points emerge from this discussion:

- It is imperative that the definition of the household is carefully worded to be as inclusive as possible, so that legitimate members of the household are not overlooked at the outset.
- To avoid double counting those individuals who consider themselves/are considered members of two households, it is as important to ask questions that allow the researcher to define residency at the place where the individual spends most of his/her time.
- To identify labour migrancy in particular, and to identify the households from which this migration occurs, either an additional question on why the person is absent from the household is necessary (as in the PSLSD, CAPS and Agincourt surveys), or an additional question/module, which specifically identifies labour migrants in the household of origin, must be included (as in the Census 1996, the OHSs 1996-1999 and the LFSs 6, 8, 10 and 12).
- To capture labour migration also in the destination household, an additional question would need to be asked of resident household members (as in the OHS 1995).

⁷ Later in the CAPS (wave 1) survey, another question is asked on "Are there any people such as small children or infants, foster children or other people who usually live with you in this household that we have not listed? If yes, go back to household roster." This may have eliminated, to some degree, the problem of overlooking household members who should have been included in the roster at the outset.

In choosing the method of data collection, three advantages of following the PSLSD approach should be considered. First, capturing information on the length and reasons for absence in some detail at the outset of the questionnaire allows *more flexibility in defining resident and non-resident household members*, so that the researcher can apply the definition most suitable to the question at hand. Second, these questions also make it possible to identify *different kinds of temporary migration*, and not only labour migration. Third, there are *economies of scale* in collecting key demographic information for non-resident members at the same time as it is being collected for resident members. This will also ensure that consistent information is gathered on all household members.

This last point is underscored by considering the alternative approach. In the OHSs and LFSs, where an additional module on labour migrants was included later on in the questionnaire, only a limited number of questions were asked about **migrant characteristics** perhaps because of space considerations in the questionnaire itself. Unfortunately, the information collected also was not consistent over the surveys.

The table in the Appendix summarises all the information available on migrant characteristics across the various rounds.⁸ To take one example here, of all the OHS and LFS years that captured migrants at the household of origin in a separate module, only the OHS 1999 asked for the age of the migrant worker. But the OHS 1999 was also the only survey that did not include information on the education of the migrant worker. Both age and education are key variables in predicting the employment and earnings probabilities of migrant workers, since this information is rarely collected for migrants from the household of origin given reporting errors⁹.

While the household is unlikely to be able to report accurately on the migrant's total earnings, they will be able to report on that portion which they receive in the form of remittances. As with the other information on labour migration, data on **remittances** sent by migrant workers are not captured consistently across, or even within, surveys.

The Census 1996¹⁰ asks for the total value of remittances received over the past year by the household, sent by anyone working or living elsewhere, and including alimony transfers. In other words, it is not possible to identify remittances sent exclusively by labour migrants. In addition, it is not possible to identify whether remittances were sent to *a specific person* in the receiving household (rather it is assumed that the payments go into the general household income pool), nor *which migrant* sent the remittance.

⁸ The type of information on migrant characteristics that has been collected (albeit inconsistently) in the various surveys includes age, gender, relationship to the head of household, marital status, whether the migrant has children in the household of origin, education, employment type, place of destination, length of migration spell and frequency of visits home.

⁹ Only in the OHS 1996 to 1999, is a question included *on what kind of work* the migrant is doing. Given very high unemployment rates in South Africa in the 1990s/2000s, this question should have been preceded with one on whether the migrant worker was employed or not. Because members of the household of origin may have not complete or reliable information on where migrants are working or under what conditions, detailed employment information for migrants should be collected in the destination household, as was the case in the OHS 1995.

¹⁰ The Census 2001 did not include a question on remittances.

The collection of remittance data over the OHSs is particularly inconsistent. The OHS 1995 did not collect any information on remittances; the OHSs of 1996, 1997 and 1998 ask for a total annual amount received from each migrant identified in the household of origin; and the OHS 1999 only asks *how often* each migrant worker sends money home. There is an additional question in the OHSs of 1997, 1998 and 1999 in a separate module of the questionnaire on other sources of income, which asks each resident member of the household if they received "remittance/financial support from relatives/persons *not in the household*" (own emphasis). In 1997 and 1998, an annual amount is requested; in 1999, respondents only had to indicate yes or no. While this additional question asks for information at the individual level, there is no way of knowing whether the payment was from a labour migrant specifically, let alone from *which* labour migrant. The question may also confuse respondents in light of a prior module on labour migration, which asks for information about labour migrants *who are household members*, albeit absent ones (and who may therefore be viewed as being "in the household").

In contrast, the LFSs 6, 8, 10 and 12 are consistent in their capture of remittance information. In the separate module on migration, the household is asked how much money each migrant remitted in the past 12 months as well as a value for the 'goods' sent by each migrant.¹¹

The PSLSD asks more detailed questions (see the Appendix) on money or in-kind contributions received by the household "from absent members of the household or any other person". **Transfers sent by the 'household'** to these members are also recorded. However, in the PSLSD it is not possible to identify which absent member is remitting income, nor whether a particular individual in the household is the intended recipient (and similarly for transfers made from the household). Rather, all information is collected at the household level. In the KIDS 1998 and 2004 these problems are overcome by recording the person code for the non-resident contributor of income to the household and the person code of the individual in the household receiving the transfer (and similarly for transfers made *to* non-resident individuals). As explained above, however, it is not possible to identify whether or not these non-resident individuals are labour migrants.¹²

To compound the problem of incomparable information on migrant workers and remittances across the surveys, other information that is key to research on the patterns, causes and consequences of migration, is also not available consistently. This information would include: farming activities, household assets (physical and financial), credit/loans obtained, total monthly household expenditure, unusual purchases, and total household income from all sources (that is from employment and non-employment sources, such as private pensions, grants, rent, interest, etc). The only survey that collected all of this information in detail as well as information on labour migrants was the PSLSD, but unfortunately, in the subsequent KIDS panel

¹¹ The LFSs 6, 8 and 10 also include questions in the household module on whether the household/anyone in the household made cash or in-kind contributions to a member/members/relatives of the family who were not part of the household. A total annual amount is collected.

¹² In Waves 3 and 4 of CAPS, quite detailed information is collected on the income transfers received by individuals in the household from anyone outside the household, and similarly on the income transfers sent. But of course this information cannot be linked to a non-resident member, or more specifically to a labour migrant, because the CAPS surveys do not collect this information.

waves, labour migration cannot be identified as in the 1993 survey. The OHS 1997 and 1998 included more detailed information on sources of income than the other SSA household surveys, but no information on farming activities, household assets or credit/loans.

The discussion thus far has centred on the collection of information about temporary or circular migration across space and households, and specifically on labour migration. Collecting information on **permanent migration** poses its own set of challenges. Decisions need to be made about how extensive a migration history is collected; whether movement is captured not only at the individual level of in-migration to a household and out-migration from a household, but also at the household level, where an entire household's relocation would be tracked; and to what level of disaggregation the place to which/from which migration occurs is recorded.

In the surveys reviewed here, migration is collected at the individual level¹³, and none of the instruments includes comprehensive (or life) migration histories for *all* household members. Both Censuses, 1996 and 2001, record where the person was born. The 1996 Census then also asks for time and place information on the person's previous move, while the 2001 Census collects time and place information on one (the last) move in the previous five years (since the preceding census). In both years, the level of disaggregation of place in the questionnaire itself is quite specific, i.e. the suburb/village/settlement. However, census data have not been released at this level of disaggregation, and rather are available only at the level of magisterial district.

In the OHSs, the method of data collection on general migration varies from survey to survey. The OHSs of 1995 and 1996 ask for the place of birth of each resident individual in the household; the OHS 1995 also asks from where the person moved if the move had taken place in the preceding year; the OHS 1996 also collects information on the time and place of the last move, regardless of when it occurred. The level of disaggregation is town/placename. The OHSs of 1997 and 1998 collect quite detailed residence information on the head of household only; i.e. present residence, the previous two places of residence and the place of birth, as well as the type of place (i.e. rural, urban, squatter next to urban area, etc), date of arrival, and main reasons for leaving previous place, for each move. The OHS 1999 collects no information on general migration.

In the LFSs 5 to 12, in an attempt to either capture in-migration to the household or perhaps to track individuals for the rotating panel, each resident household member is asked whether they lived in the same household at the time of the preceding survey (six months earlier). The LFSs 8, 10 and 12 then proceed to ask questions on place and date of last move, but only if the move had occurred in the preceding five years.

The 1993 PSLSD is unique in that it asks of all resident and *non-resident* members of the household for their last place of residence, but only if the move had occurred in the preceding five years.¹⁴ While the KIDS 1998 and 2004 waves do not ask any questions on migration specifically, by default, residence information would need to

¹³ The one exception here is the Agincourt DSS survey, which distinguishes between individual and household migration, if the entire household had moved together.

¹⁴ Note that the use of the 'preceding five years' reference period is quite commonly used, as there is concern that respondents may have difficulty recalling earlier moves with accuracy.

be collected for tracking purposes for the panel survey. Similarly, the CAPS waves collect detailed information on residence for tracking purposes. But, in addition, the CAPS surveys collect comprehensive information on the year and place of residence for each young adult (using a life history calendar method), on any changes in place of residence since the previous wave (including how many, reason for, when, and with whom), and in the first wave, even on expectations of future migration. Because the focus of the CAPS surveys is on young adults, however, migration information and histories are not collected for all household members as comprehensively.¹⁵

Summary of limitations of existing survey instruments on migration

- There is a lack of consistency in definitions of the household, residency and labour migration across surveys and even within surveys (i.e. across rounds/waves).
- With one exception (the PSLSD), the only kind of temporary migration that we can identify in national data sets is labour migration.
- We don't have a full set of characteristics of labour migrants (including their age, education, relationship to others (household head) in the household, marital status, employment status and for how long they have been migrants).
- We generally cannot identify labour migrants in the destination household in national data sets (with the exception of the 1995 OHS and the Census 1996), and we therefore have little detailed (and reliable) employment information (such as employment status, occupation and earnings) on labour migrants.
- In neither the Census nor the nationally representative household surveys is it possible to consistently identify who sends remittances **and** who receives them, at the individual level.
- In most surveys where information on labour migration is collected, we don't have complete information on total household income and other key household characteristics useful for migration research.
- While some panel data available collect detailed information on key aspects of labour migration and migration more generally, the samples are regionally and/or age specific.
- None of the instruments reviewed here collects comprehensive or life histories of *all* household members.

¹⁵ In the first wave information is collected on place of birth, date of move to Cape Town and date of move to current residence, for all resident household members. In each subsequent wave, there is also a question in the household roster section on why old members are no longer a part of the household, and questions on key demographic information for any new members that have joined (including place of birth and date of move to Cape Town).

4. What do we know about migration in South Africa (and how could we know more)?

In a short review, it is difficult to do justice to the broad range of issues relevant to migration, to the different types of migration, and to all the available literature across disciplines on migration in South Africa. The focus in this section is on internal migration within South Africa. (For discussion and literature on cross-border and international migration see, for example, Anderson 2006, Kok et al 2006, MacDonald 2000, de Vetter 2000, Crush 2000, and Crush & Williams 1999.)

In recent years, migration in South Africa has been relatively under-explored by economists, partly because of inadequate and incomplete data to investigate migration. Our objective here is to outline key patterns and trends in migration, the main areas of research, and the ways in which research would be facilitated by the availability of better, and particularly longitudinal, data. We start with a brief review of the literature on general migration in South Africa. However, because much of the empirical (and economic) work on migration over the past decade has investigated labour migration and remittance transfers, this research is the focus of our review.

A brief summary of general migration patterns

Most of the work on general patterns of migration in South Africa over the past decade has had to rely on information provided by the 1996 Population Census (see, for example, Kok et al 2003).

By 1996, Kok et al (2003) estimated that about one quarter of the population in South Africa had ever migrated across magisterial districts, and about twelve percent had migrated in the period 1992 – 1996. Adults of working-age 20 to 59 years were the most likely ever to have migrated, with migration for the five years preceding the 1996 Census being highest among individuals in the 25 – 29 year age bracket (Kok et al 2003:53-55). Although men were more mobile than women, a comparison with migration rates derived from the 1980 Census suggests a clear narrowing of this gender differential in general migration.

Relative to respective population sizes, whites were considerably more mobile than other race groups from 1992 to 1996. Kok et al estimate that among all whites who were resident in the country in 1996, about one fifth had moved in the preceding five-year period. In comparison, the estimated population migration rate among blacks was only ten percent (although almost seventy percent of all migrants in the country were black) (Kok et al 2003:55). These estimates do not include mobility through immigration, but if whites are disproportionately represented among those leaving South Africa to settle abroad, then the migration differential would be even larger.

Most internal migration (about three quarters) was to metropolitan areas (Kok et al 2003: 35).¹⁶ For the five-year period from 1992 – 1996, Gauteng emerged as the most

¹⁶ Kok et al (2003:35) qualify this as estimates derived "by some measures", but they don't specify what these measures entail.

popular destination for moves from non-metropolitan regions and for inter-provincial migration more generally. It was also the province from which most metropolitan migration originated. However, in-migration considerably exceeded out-migration so that Gauteng was estimated to have experienced a net gain of about 262 000 individuals over the period. Net gains were experienced also by the Western Cape, and to a smaller extent, by Mpumalanga. In all other provinces, out-migration exceeded in-migration, with the largest differential evidenced in the Eastern Cape (Kok et al 2003:35-39).

The smallest settlement type made available for analysis in the census data is the magisterial district (rather than a town or village in this district) Furthermore, the mapping of the district from which migration occurs to the destination district is a mammoth undertaking at the census level (involving 365² possible combinations) (Kok et al 2003:49). Consequently, census data provide a blunt instrument for investigating more textured patterns of migration, identified in case-study or more regionally specific research, of increased migration to semi-urban towns, to the rural perimeters of metropolitan areas and between rural villages (see, for example, Collinson et al 2006, Collinson & Wittenburg 2001, Vaughan 2001, Collinson et al 2000, Cross et al 1998).

The census also captures a very truncated migration history. Both the 1996 and 2001 Census collect information on where individuals were born, making it possible to identify at least one migration (if "usual residence" differs from place of birth). Furthermore, both capture information on one migration episode prior to the census year, although the 2001 Census restricts this to migration in the five years preceding the census. However, if migration patterns are changing, becoming more frequent and over shorter distances, then more migrant episodes would need to be recorded, and existing census data will underestimate the extent of mobility among the migrant population.

Neither the 1996 nor the 2001 Census collects information on why migration occurred, perhaps because this kind of information would best be captured through household surveys that cover a smaller portion of the population but in more depth. Few household surveys, however, include questions on general migration, and obviously therefore on the reasons for migration. One source of information that does collect this information is the 2001-02 HSRC Migration Survey¹⁷, in which a national sample of 3 618 individuals were surveyed (Kok & Collinson 2006).

Of the 2 142 internal migrants included in this survey, the most common reasons cited for leaving the previous area of residence, and for moving to the current area of residence, relate to employment (either to take up, or to look for, work). Access to housing and education are the next two most common sets of responses provided (Wentzel et al 2006: 188). The survey data also suggest large differences between men and women as to why migration occurred, with women more likely to report reasons that were not employment-related (including moving to get married, to be closer to social networks and support, and being a tied-mover) (Wentzel et al 2006).

¹⁷ We do not review this survey in the earlier section, because the instrument and data do not seem to be publicly available.

We know little at the national level about the distribution of overall internal migration between that which is permanent or "definitive", involving a change in the "home base", and that which is "temporary" in that migrants are intending to return to their households of origin.¹⁸ In the Demographic Surveillance System (DSS) conducted in Agincourt (a largely rural sub-district of Bushbuckridge), about two-thirds of all migratory moves in 2002 were identified as temporary (Collinson & Kok 2006). This finding suggests the continuing importance of temporary labour migration in particular, discussed in more detail below. But it is likely to considerably overestimate the share of temporary migration in national migratory moves, because temporary labour migration in South Africa is more pronounced from rural areas.

Labour migration

Historically, much of the labour migration that has occurred in South Africa has involved the temporary migration of individuals to places of employment. Black migrants, who were not permitted to settle permanently in the destination area, retained membership in their households of origin, or their home base, to which they would return after their period of employment. This temporary labour migration therefore was associated with patterns of circular migration, and with a "sharing" of the migrant's wage through remittance transfers with the household of origin.

Restrictions on the movement and settlement of people in South Africa were lifted in 1986. We would therefore expect that the extent of circular labour migration would have declined over the first post-apartheid decade, and that permanent migration (of workers and their households) would be replacing the temporary migration of individuals. Research based on the nationally representative household surveys for the period 1993 to 2002, however, suggests that this may not be the case (Posel & Casale 2006, Posel 2006, Posel & Casale 2003). Over this period, an increasing number of households reported that they contained at least one household member who was away for a period of time each year to work, or to look for work.

Most of the households that reported non-resident labour migrants were black households located in rural areas of the country; and most of the increased incidence in this migration occurred among rural black households (accounting for about 330 000 of the 410 000 additional "labour migrant households") (Posel & Casale 2006). A high prevalence of temporary labour migration through the 1990s is documented also in black households sampled in the Agincourt DSS (see for example Collinson et al 2006, Collinson & Wittenberg 2001).

Continuing patterns of temporary labour migration are perhaps unexpected and need to be interrogated further. Is this migration comparable with that which was state-enforced under apartheid? Certainly, household survey data show that most labour migrants continue to remit income and therefore retain economic ties with their households of origin. However, the "temporary", "circular" nature of this migration warrants more study.

¹⁸ It should be possible to get some estimate of this using the 1996 Census, which also identifies migrant workers, although temporary migration may include migration for reasons that are not labour-related. However, we have not found any studies of these data that quantify the share of labour migration in total migration.

One explanation for continued circular labour migration may be that deeply entrenched migration patterns take time to change. There are also a number of economic factors, identified in case study research, that may explain why individuals would continue to migrate temporarily, retaining membership in their household of origin, even in the absence of restrictive settlement policies. For example, high levels of unemployment in South Africa increase the risks and costs of labour migration, and having a rural home base may provide insurance, or the opportunity to spread risks, in the context of growing labour market insecurity. Higher costs of living in urban settlements may also explain why individuals, rather than households, migrate. (See, for example, Cox et al 2002, Bank 2001, James 2001.)

Moreover, the rise particularly in female labour migration, identified in both the national household surveys and in the Agincourt DSS (Collinson et al 2006, Posel & Casale 2006, Posel & Casale 2003 and Collinson & Wittenberg 2001), may mean that households of origin (continue to) play an important role in the care of young children, making it possible for working-age women to move in search of employment (Posel et al 2006).

However, it is also possible that what is being reported as "temporary" or "circular" labour migration through survey instruments is in fact the precursor to the permanent out-migration of individuals. Individuals whom the household has identified as non-resident household members may be retaining economic ties with, but may not be intending to return to, their household of origin.

Furthermore, perceptions of whether migration is temporary or permanent may differ between the migrant and the household of origin. This would explain why the extent of temporary labour migration when measured by identifying migrant workers in their destination household (as individuals whose home is elsewhere), is significantly lower than the measure derived when migrant workers are identified in their household of origin (Posel & Casale, 2003). Different perceptions of who is a member of the household of origin, among those who have remained behind and those who have out-migrated, may also suggest differences in the expectation of the migrant's return to the original household.

Relatively little research has been conducted on the nature and extent of return migration in post-apartheid South Africa, and regional studies that have been done do not demonstrate consistent patterns. Research from the Agincourt DSS field site documents "a large number of people returning to rural areas" (Collinson et al 2000:8). Other research which has investigated return migration from the Western Cape to the Eastern Cape, has found that return migration to the Eastern Cape may be low or becoming "less common" (see respectively Bekker's (2001) study based on 660 black and coloured households in the Eastern and Western Cape, and van der Berg et al's (2004) study of the 1996 Census). Although many new migrants may have the intention to return to their households of origin, this desire may weaken with length of stay in the destination area (Bekker 2001, Collinson et al 2000).

There is clearly the need for more work on patterns of labour migration that probes whether and when migration is "temporary". Recent research based on the 2001 Census and the Agincourt DSS provides some important pointers for this inquiry, suggesting that migration which involves larger geographical distances (for example

from rural to urban areas) may be more likely to be temporary than migration over smaller distances (for example from rural villages to small nearby towns) (Collinson et al 2006).

The collection of longitudinal data would greatly facilitate this research. With the inclusion of appropriate questions in the survey instrument, we can track which labour migrants return to their "home base" and why; whether temporary labour migrants are joined over time in the destination household by other members of the household of origin; when individuals stop being identified as non-resident members of the household of origin; and the nature of temporary migration for reasons other than employment.

Longitudinal data would also permit a more rigorous and textured analysis of the extent of labour migration, of who is migrating, and from which households this migration is occurring. Estimates of labour migration derived from the cross-sectional nationally representative household surveys, which require that labour migrants retain membership in their household of origin, will underestimate the extent of outmigration for employment reasons. Furthermore, migrant workers who do retain membership in their household of origin may constitute a select sample of those who migrate to work, both in terms of observable characteristics (such as education) and unobservable characteristics (such as motivation and altruism).

A key factor that is likely to affect the nature of labour migration is the migrant's economic status in the destination area. Because we cannot expect to collect reliable employment and earnings information on labour migrants through the household of origin, labour migrants must also be identified in their destination households (and distinguished from other individuals who have migrated "permanently" for employment reasons).

There has been very little research on where labour migrants are employed, and on their transition from unemployment to employment. Some work has used October Household Survey data from 1996 to 1998, where employment information on migrant workers was captured in the household of origin (Cox et al 2002). Cox et al do not investigate unemployment among migrant workers, but they describe the industries and occupations in which (respondents think) employed migrants are located. Male migrant workers are over-represented in mining, although with falling employment in the mining industry, the share of male migrant workers in public and private security work increased over the period. Female migrant workers are over-represented in domestic work. These findings seem consistent with those reported in van der Berg et al's (2004) study using 1996 Census data, that young rural black labour force participants who would do better in urban job queues find employment in rural areas.

In their analysis of the 1996 Census data, Kok et al (2003) investigate how labour migrants compare to other individuals who have migrated "permanently" for employment reasons. Their analysis suggests that in comparison to labour migrants, "migrants 'proper' are often the less vulnerable, better-educated urban residents" (Kok et al 2003:71). This is an area that warrants further investigation through the panel study.

More research is needed also on other kinds of temporary migration, including whether children (increasingly) are moving to households in other areas to gain access to better schools or in response to household shocks (such as the death of a primary care-giver), and whether children are moving alone or with others. Migration patterns in the Agincourt DSS from 1992 to 2003, for example, are characterised by small but consistent increases in the temporary migration of children younger than 14 years, albeit from a very low base (Collinson et al 2006). Much of this migration is to Gauteng, with schooling identified as "the most prevalent cause of this flow" (Collinson et al 2006:31).

Remittances

Remittance transfers which occur at relatively discrete intervals, are easier to identify than many other intra-family transfers, and they therefore provide a unique empirical opportunity to investigate the sharing of resources among household members.

Remittance transfers are a significant source of income, particularly for rural black households. In the September 2002 Labour Force Survey, for example, remittances were identified as the main source of income for more than a third (36.3 percent) of rural black households with labour migrants (Posel & Casale 2006).

The majority of rural black households with migrants (between 75 and 85 percent) report receiving remittances. With existing data, however, it has been difficult to analyse systematically what accounts for variation in the amount remitted, and how remittances have changed over time. This is partly because those survey instruments that do include questions on both labour migration and remittances have not consistently collected disaggregated information linking remittances to individual migrant household members.

The interpretation of cross-sectional data on remittances is complicated also by probable selection effects. Household members who have migrated, and who continue to be identified as members of the household of origin, are more likely to be remitting. Excluded from the sample of migrant workers therefore would be those former household members who have migrated to places of employment, and who are no longer considered members of the sending household, perhaps because they have not retained (economic) ties with the household (Posel & Casale 2003). It is also possible, although we cannot see it in available data, that some senders of remittances are not identified as members of the receiving household.

Furthermore, in most data sets it is not possible to see, or to match, both the household *to which* remittances are sent and the household *from which* remittances are sent. Tracking migrants to their destination households is an enormous project in a large national survey. If tracking is not undertaken, then there are good reasons to capture information on remittances sent in *both* the receiving and in the sending household, even although these data obviously would not be matched (Posel 2001b).

Information on remittances collected through the sending household can be used to examine how changes in the migrant's economic status and social circumstances affect remittance behaviour. Information on remittances collected through the recipient household can be used to test the motivations for these transfers – how

remittances respond to the economic need and composition of the recipient household (Stark 2001, Secondi 1997). Because the *ability* to remit is likely to be a significant predictor of the *propensity* to remit, some information about the employment status of the migrant worker should also be collected in the receiving household. (As noted in section 3, survey instruments that identify migrant workers in sending households typically do not also identify whether migrants in fact had employment.)

Most household surveys in South Africa, and the 1996 Census, identify remittances only in the recipient household. The 1993 Project for Statistics on Living Standards and Development (PSLSD) and the KwaZulu-Natal Income Dynamics Study (KIDS), however, also collect information on remittances sent, and in the KIDS data it is possible to see who the *individual* remitters are (rather than simply the households from which remittances are transferred).

Research which investigates remittance transfers using information collected at the point of receipt identifies kinship and marital ties as significant predictors of remittance transfers.¹⁹ Migrants remit considerably more if their spouse and children are resident in the household which receives the remittance (Bowles & Posel 2005, Posel 2001a).

There is also evidence that migrants remit relatively more to households that are more in need (Maitra & Ray 2003, Posel 2001a), and that other sources of income in the receiving household, and particularly the receipt of social pensions, crowd out remittance transfers (Jenson 2003, Posel 2001a). After controlling for possible endogeneity between public and private (remittance) transfers, Maitra & Ray (2003:43) find that social pensions acted as substitutes for private transfers only among poor households in the 1993 PSLSD. Adequate information on social grants has not been collected in the national household surveys since 2000. Consequently the effects on remittances, of significant increases in social assistance over recent years, have not been explored further.

Studies of remittance behaviour at the point where remittances are sent affirm the importance of family ties in predicting remittances. Family ties within the destination household crowd out remittances sent to recipient households by creating competing demands for the migrant's income. For example, migrants remit relatively less, and less frequently, when they live with children (and particularly of school-going age) in the destination household (Posel 2001b).

This research highlights also the non-pooling of income in households from which remittances are sent. Income earned by remitting migrant workers is spent differently to other income in the destination household, and in particular, contributes significantly more to remittance transfers (Posel 2001b). In other words, households do not remit income, rather individuals do. This underscores the importance of collecting individual- rather than household-level information on remittance transfers.

Although remittance data have not been collected consistently over time, data that are available suggest that economic ties between labour migrants and their households of

¹⁹ These studies use the 1993 PSLSD data, for a restricted sample of households with labour migrants as non-resident members, where remittances could be matched to labour migrants (Bowles & Posel 2005, Posel 2001).

origin may be weakening. The average value of remittances (conditional on a positive transfer) increased in nominal terms from 1993 to 2003, but in real terms remittances fell consistently from 1993 (Posel & Casale 2006). Furthermore, the proportion of migrant households receiving remittances declined, particularly from 1999.

A number of changes in the institutional environment may be relevant in accounting for a decline in remittance transfers. High and rising unemployment rates, less secure forms of employment and falling average real wages could mean that migrant workers are less able to afford remittances (Posel & Casale 2006). The increase in the coverage and the value of the social pension, paid to all age- and means-qualified individuals, may also have reduced the (perceived) need for migrants to remit income. Furthermore, the longer the period of migration and the greater the possibilities for permanent settlement, the more likely migrants are to be joined by other family members from the household of origin. They may also be more likely to develop new ties and commitments in the destination area that compete with obligations to households in sending areas.

Given the reliance of rural households on remittance transfers, more research, and more data are needed to interrogate further how and why remittances are changing. Trends in remittances are best explored through a panel data study, where changes in individual remittances and their likely determinants can be tracked and analysed over time.

Economic implications of migration

A key question that has received little direct attention in the recent migration literature concerns the effects of migration on the households and areas from which this migration occurs. This research lacuna likely reflects the absence of adequate income data in existing national cross-sectional data sets, as well as the more fundamental limitation of using cross-sectional data to answer questions about changes over time.

Households that report labour migrants in South Africa are more likely to be poor, and to experience more severe poverty than non-migrant households (Posel & Casale 2006, Leibbrandt et al 1996). In 1997, for example, total real household income in migrant households was about sixty percent of that in non-migrant households. More than half of the migrant households reported an adult equivalent income of less than a dollar a day, compared to about 29 percent of non-migrant households (Posel & Casale 2006:356). Although there are across-survey comparability concerns, there is further some suggestion that the income gap between migrant and non-migrant households may be widening over time.

Using cross-sectional data, however, we cannot disentangle the relationship between migration and access to resources: are households poorer because migration has occurred, or does migration occur from poorer households? With panel data, we are able to compare the same households before and after migration, and track changes in economic well-being among migrant and non-migrant households. We can also get closer to understanding *when*, or under what conditions, migrant households display downward mobility and when migration may be successful in lifting households out of poverty.

Carter and May's (1999) study of livelihood generation in South Africa suggests interesting avenues for this research. Using the PSLSD data, Carter and May investigate the relationship between returns to land and transfer (remittance) income. Transfer income is "a potential source of self-finance for agricultural production" (1999:14), but they find positive returns to land only at high levels of transfers. At low levels of transfers, the marginal returns to land are negative (holding labour constant).

More extensive research on the economic consequences of general migration, and labour migration in particular, will therefore also require the collection of comprehensive information on livelihood strategies, including access to land, and income (or the imputed value of output) generated.

5. Longitudinal data for studying migration – advantages and difficulties

By way of summarising arguments presented in the data and literature reviews, we recap here some of the main benefits of, and difficulties involved in, collecting longitudinal or panel data on migration.

Key analytical advantages are that longitudinal data help to control for possible **selection effects** and to **disentangle causality** when measuring changes over time. Examples include:

- 1) Existing research finds that households with labour migrants in South Africa are significantly poorer than households without labour migrants. With longitudinal data, we can compare the same household before and after migration, and we can compare changes in the economic status of migrant and non-migrant households. We will therefore be able to investigate whether migration exacerbates (or 'causes') poverty, or whether poverty necessitates (or 'causes') migration.

By surveying the same households over time, we can also investigate *when*, or under what conditions, migration is associated with positive economic outcomes for households of origin. This broad area of inquiry has important policy implications for it helps us understand whether migration is an effective strategy for rural development in post-apartheid South Africa, and more generally, whether economic growth in the metropolises can be relied upon to motor rural development.

- 2) A related research area concerns the effect of migration on rural income inequality. Does migration have an equalising or an unequalising effect on the distribution of income of rural households? With longitudinal data we can investigate this question by exploring whether remittances have a non-unitary effect on household incomes. For example, because we can 'see' the household before and after migration, we can investigate whether the initial asset holding of sending households affects the receipt and value of remittances, and whether remittances have production side-effects.
- 3) Central to investigating the economic consequences of migration for 'those who remain behind' is to understand how and why economic ties between migrants and

their households of origin change over time. For example, is there evidence of the "remittance decay hypothesis" which predicts that remittances decline the longer the length of absence of the migrant? This question cannot be answered adequately using repeated cross-sectional data partly because with these data we cannot identify changes in the recipient household over time – changes in household composition, whether the household experiences an economic shock (such as a death), or gains access to other forms of income (for example, social grants) – and partly because we cannot identify whether and when migrants stop remitting income (and are no longer identified as migrants).

- 4) Longitudinal data also permit research into the economic consequences of migration for migrants themselves. With data collected over time, we will be able to track a migrant's transition into employment, and we can compare changes in earnings among employed migrants and non-migrants (both in the destination and sending areas). If both migration and employment and unemployment *histories* are collected in the survey, then it will also be possible to examine earlier migration episodes and related employment outcomes.
- 5) We will also be able to interrogate more closely how and why migration patterns are changing in South Africa. For example, with panel data, we can identify if and when labour migration becomes permanent, and when migrants return (permanently?) to the household of origin. Through the collection of migration histories, and migrant events in subsequent waves of the panel study, we will also gain a far better understanding of the extent of, and reasons for, individual and household mobility, and of the different kinds of migration that are occurring.

There a number of **difficulties**, however, associated with collecting good panel data on migration. For example:

- 1) The most obvious challenge is tracking **households** in subsequent waves over large distances in a national survey. If attrition is high due to people moving away, then this will clearly affect our ability to say something meaningful about migration patterns, as the representivity of the original sample will be reduced.
- 2) A further challenge is tracking **individuals** who leave/split from the original household, especially if they move to a place that is far away.
- 3) This is even more difficult in the case of temporary labour migrants who still retain membership in their household of origin. It would be ideal if we were able to link individuals who split from the original household to the household of origin. With a very large sample distributed over all of South Africa, the problems of **matching** households from which labour migration occurs and to which remittances are sent, with households to which labour migration occurs and from which remittances are sent, are obvious.
- 4) The panel has to have a starting point – so information is collected about individuals, and the households they live in, from some discrete point in their lives. It is useful to try and collect information on some key events that have occurred up to that point, and that could influence current/future outcomes. If **retrospective** data are collected – migration histories, for example – then we

would expect recall problems. How can we minimise these problems or estimate the extent of the recall bias? One option is to recapture these histories during a later wave, so that the extent of the recall bias can be estimated.

- 5) It is important to collect information on *all in-migration* into the household, i.e. on new *individuals* joining the household, as this will have a bearing on how the household functions. To take one example, it is not possible to calculate household poverty if the number and age of household members and all sources of income of these members are not recorded.

6. What data should be collected?

In Section 6.1 below we provide a set of questions for possible inclusion in the baseline study. In Section 6.2 we suggest what questions should be included in the subsequent waves of the panel, and we point out some key issues that need to be considered when defining the household and tracking individuals in the later rounds.

As highlighted in the data review section earlier, the way in which questions on migration are asked depends crucially on how information is collected in the household roster. We provide two options below – the first uses a broad definition of the household where resident and non-resident members are listed in the household roster (and residency is established later on in that module) as in the PSLSD; the second uses a narrower definition of the household that requires the individual to spend most of his/her time in that household (i.e. only resident members are listed in the household roster) as in the OHSs/LFSs.

The questions are organised under the following headings:

1. Household roster and related demographic module

1.1 Household definition

Option 1 (Broad definition)

Option 2 (Narrow definition)

1.2 Identifying migrant workers in the destination household

1.3. General migration questions

2. Migration Module I (General migration)

3. Migration Module II (Labour migration and remittances)

There are two main routes through these sections, depending on space constraints in the questionnaire. The shortest route involves asking all the questions under Section 1 only (the household roster and demographic module), using the broad definition of the household. This allows non-resident labour migrants and their key demographic characteristics to be captured at the outset in the household of origin, taking advantage of economies of scale in collecting this information (Section 1.1, Option 1). A few questions on resident migrants in the destination household are then included (Section

1.2), as well as a relatively truncated set of questions on general migration that would be asked of all resident household members (Section 1.3). The main disadvantage of this approach is that more detailed questions on labour migrants and remittances and migration in general cannot be included in the household roster and demographic module.

The most comprehensive route involves asking the questions contained in Section 1.1 and 1.2, supplemented by Sections 2 and 3, that is two separate and more detailed migration modules, one on general migration (including a (life) history of migration for all resident household members) and one on labour migration and remittances (where respondents in the household of origin report on non-resident labour migrants). Either definition of the household could be used here. If Option 1 is chosen, key demographic information on migrants (i.e. age, gender, education, marital status, etc) can be captured at the outset and only the additional questions specific to labour migrants and remittances will be asked under Section 3. If Option 2 is chosen, then key demographic information on labour migrants will have to be collected in Section 3 as well.

A note on international surveying practices is worth mentioning here: In both the Indonesian Family Life Survey (IFLS) and the Mexican Family Life Survey (MxFLS) a separate module each on permanent and temporary/circular migration is included. In both surveys adults are asked quite detailed information on their previous places of residence since the age of 12 in the general/permanent migration module. However, these surveys do not use as broad a definition of the household as the PSLSD, which means that circular/temporary migration information is collected only from members of household who are *currently resident*. The IFLS includes people who have been in (or plan to be in) the household for six months or more and the MxFLS includes those who have been in (or plan to be in) the household for one year or more²⁰. In this module information is then collected on all types of temporary/circular migration (i.e. not just labour-related) that the resident individual had already engaged in. So in the case of the IFLS, adults are asked questions on places visited in the previous 24 months if the visit involved crossing a village border and lasted for more than one month. In the MxFLS, adults are asked questions on any move in the last two years if it involved crossing local boundaries and lasted between one and 12 months.

While we favour the option of having two separate modules on general/permanent migration and temporary/circular migration, we feel that for NIDS the latter module should be focussed on labour migration in particular. Because of the unique nature of South African migration patterns, it is likely that most circular migration will be for labour-related reasons. Having a separate module dedicated to labour migration in particular allows us to ask some specific questions on the labour migrant him/herself and the links between the sending household and the labour migrant (especially remittance transfers). A further advantage then of using the PSLSD method of household definition, is that the questions in the household roster, on length of absence and reason for absence make it possible to identify *different kinds of temporary migration*, and not only labour migration (so for example, migration for education, health, family-related reasons, etc).

²⁰ Although the MxFLS does include a note that someone who has left temporarily on vacation or for labour reasons (for less than a year) is still considered a household member.

6.1 Questions for the baseline survey

Question	Code list	Notes	Modelled on	Implications & problems
1) Household roster and related demographic module				
1.1 HOUSEHOLD DEFINITION (2 options are considered below)				
<p>Option 1 (Broad definition)</p> <p>Collect information on all household members – resident and absent.</p> <p>Example: Individuals who meet all 3 of following criteria: (i) They live under this "roof" or within the same compound/homestead/stand at least 15 days out of the past year and (ii) When they are together they share food from a common source and (iii) They contribute to or share in a common resource pool.</p>		<p>Key demographic information collected on <i>all</i> household members:</p> <ul style="list-style-type: none"> -age -marital status -spouse/partner living in household (yes/no and person code) -gender -race -relationship to household head -education 	PSLSD	<p>This approach implies starting with the broadest definition of the household, and then later narrowing household membership to include only 'resident' members.</p> <p>The IFLS and MxFLS include similar criteria to (i) and (iii) in their household definition. However, it may be better to <i>exclude these criteria</i> here – the 'common pot' and 'common resource pool' were relaxed for the CAPS survey as it was felt that these may not be applicable to many households in SA (Lam et al, 2005)</p> <p>Question How to deal with <i>domestic workers</i> in the</p>

				definition of the household? Suggest that it is specified that they be treated as a separate household.
How many months did ... spend away from the household in the last 12 months?		Asked of all on household roster	PSLSD	
What is the reason for his/her absence?	<ul style="list-style-type: none"> - Looking for work - Working - Schooling/student - Escape violence or political problems - Visiting spouse or family - Visiting friends - Living with other partner - Prison - Holiday/vacation - In hospital or clinic - Away on business - National service - Other (specify) 	<p>Asked of all on household roster.</p> <p>Looking for work, and working need to be clearly distinguished.</p>	PSLSD	This information is then used to identify migrant workers.

<p>Residency requirement</p> <p>How to define residency?</p> <p>Option A Has ... lived under this roof for more than 15 days of the last 30 days?</p> <p>Option B Does ... usually spend most of his/her time in this household, that is, on average 4 nights a week?</p> <p>Option C Don't include an explicit question but continue questions only for those who had lived in the household for more than 6 months of the previous year.</p>		<p>Asked of all resident and non-resident members:</p> <p>For Option A, specify that individuals away on vacation should be included as resident; individuals "visiting" (e.g. those on holiday, including migrant workers) should not be included as resident.</p> <p>Only if yes to the question on residency, are more detailed personal and employment questions then asked about the individual.</p> <p>Enumerators must ring the person codes of resident members.</p>	<p>Option A: PSLSD</p> <p>Option B: Similar to OHS/LFS</p>	<p>PROBLEMS with Option A (using the previous month as the reference):</p> <p>i) What of those who are away on holiday that month for example?</p> <p>ii) What of migrants who happen to be resident in the household of origin during the month of the interview?</p> <p>Hence instructions in the "Notes" column.</p> <p>PROBLEM with Options B and C is that information on short-term migrants (< 6 months on average) may then be captured twice – both as residents and then later in the labour migrant module.</p>
<p>HOUSEHOLD DEFINITION</p> <p>Option 2 (Start with narrow (residency) definition) Collect information on every person who usually resides in this household.</p> <p>("Usually resides" typically is specified as "at least 4 nights a week".)</p>		<p>Demographic characteristics collected only on <i>resident</i> household members</p>	<p>OHS &LFS</p>	<p>Non-resident household members are not included in the household roster.</p>

Question	Code list	Notes	Modelled on	Implications & problems
1.2 IDENTIFYING MIGRANT WORKERS IN THE <u>DESTINATION</u> HOUSEHOLD (These questions capture information about resident household members working away from what they consider their home base.)				
<p>Is ... a migrant worker (that is a person working or looking for work away from what he/she considers "home")?</p> <p>Note: A time frame needs to be stipulated here. Surveys in SA typically have used "away for a month or more to work or to look for work" to identify migrant workers at both the sending and destination households.</p>		<p>Asked of all RESIDENTS. Migrant worker will be resident in the destination household.</p> <p>Because respondents in the household of origin will not have complete or reliable information on the nature of the migrant's employment, this information needs to be collected through the destination household.</p>	OHS 1995	<p>How reliable is <i>identification</i> of membership in another household, in the case of proxy-reporting for the "migrant worker"?</p> <p>How much information should be collected on employment and education histories of resident members in other modules (which would include both temporary labour migrants at their destination household and people who have migrated permanently for employment reasons)?</p>
Where is this "home"?	Sub-place Main place Province Country, if not SA	Decisions need to be made about the level of disaggregation here.		
How best would you describe (PLACE)?	Possible codelist take from OHS 1997 (Section 7)	Question could be useful given variation in area type within sub-place.	OHS 1997 IFLS MxFLS	

	Rural area Urban area Squatter inside urban area Squatter next to urban Squatter in rural area Commercial farm Other			
Is planning to go back to (PLACE) to live permanently at some point in his/her life?	Yes/no	Only really useful if no proxy responding	CAPS wave 4 – older adult module on links to Eastern Cape	
If yes, why?	Possible code list could include: - To retire - To return to family - To get married - For health reasons - To take up employment - To look for employment - Other (specify)	Only really useful if no proxy responding		

1.3 GENERAL MIGRATION

We outline here questions that could be included in the initial demographic module, if only a truncated migration history is collected. The alternative is to include a separate, more extensive module to capture a more detailed migration history. We consider this alternative later on.

Question	Code list	Notes	Modelled on	Implications & problems
Standard Questions				
Where was ... born?	Town/place name Magisterial district Province Country (if not RSA)	1. To be asked only of RESIDENTS. 2. This question could be divided into 3 questions, as in the 2001 Census: i) Was ... born in SA?	OHS (e.g. 1996)	Note – this means that we would <i>not</i> be collecting this information about migrant workers and other non-resident

		ii) If yes, where? iii) If no, in what country?		household members.
In what year did ... move into this dwelling (e.g. house, room, flat, shack)? (If the individual was born in this dwelling, and never moved away and back, then skip all subsequent migration questions.)	Write in the year. If born here, and never moved, write 0.	.	OHS, 1996 Census	
Where did ... move from? (Where did ... live before living here, in this dwelling?) How best would you describe this place?	Town/place name Magisterial district Province Country (if not RSA) Possible codelist take from OHS 1997 (Section 7) Rural area Urban area Squatter inside urban area Squatter next to urban Squatter in rural area Commercial farm Other	To be asked only of those who have moved. Question is useful because retrospective post-coding is not possible.	OHS, 1996 Census OHS 1997 IFLS MxFLS	
Additional questions to consider				
Why did ... move here? (Allow multi-options) OR What was the main reason ... moved here? (Allow one option)	Possible code list could include: - Parents moved - To follow a spouse/partner - For schooling - To return to family - Marriage - Pregnancy - Breakdown of a marriage or relationship		Lucas (2000) – questionnaire template MxFLS IFLS	Will respondents be able to identify a single reason? Preferred: allow three response options If move includes change of residence, as opposed to change of

	<ul style="list-style-type: none"> - Death of a household member - Look for work - Start a new job - Other work-related reasons - Could not afford to live in previous place - To move to a better neighbourhood - To retire - For health reasons - Violence and crime - To access better health facilities - Forced of move (evictions) - To access better facilities such as transport, housing or water. - For other personal reasons - Other (specify) 			place, then codelist may need to be amended, e.g. another option 'To get a place on his/her own' would need to be included.
Who did ... move with?	<ul style="list-style-type: none"> - Nobody - Other household members - Other non-household members 	Allow two options	CAPS IFLS MxFLS	We could infer this information by tying all those who moved in the same year (although there is the possibility that people who moved in the same year moved from different places).
If yes to 'Other household members', ask: With which other household members did ... move?	<ul style="list-style-type: none"> - Spouse/partner - Mother - Father - Grandmother - Grandfather - Children 	Allow multi-options	CAPS IFLS MxFLS	

	<ul style="list-style-type: none"> - Brothers/Sisters - Parents-in-law - Other family member - Other person, not related - Other 			
When ... moved into this dwelling, was anyone else he/she knew already living here? If no, skip next question.	Yes/No		Lucas (2000)-questionnaire template	
Who did ... know who already lived here?	<ul style="list-style-type: none"> - Spouse/partner - Mother - Father - Grandmother - Grandfather - Children - Brothers/Sisters - Parents-in-law - Other family member/relative - Other people from place of birth/place of previous residence - Other 	Consider: allow up to 3 choices	Lucas (2000)-questionnaire template	To identify the role of kinship and social networks in influencing migration destination.
Do you think that ... will be living in this place a year from now (by place I don't mean this dwelling but rather this area, village, town, city, for example)?	Yes (answer next question) No (skip next question) Don't know (skip next question)	Asked of all resident members of the household regardless of age	CAPS Wave 1 MxFLS	Questions on expectations are problematic when adults are not self-reporting. The time frame could be one year or the lapse between survey rounds.
Where do you think ... will move to?	Town/place name	What level of place	CAPS Wave 1	Questions on

	<p>Magisterial district Province Country (if not RSA)</p>	<p>disaggregation?</p>	<p>MxFLS</p>	<p>expectations problematic when adults are not self-reporting.</p> <p>Note: This question and the preceding one are included to capture expectations so that in subsequent waves one can look at whether expectations were fulfilled. Additional questions would need to be asked at the end of the questionnaire along with other tracking information (for e.g. contact details of other individuals that do not live in the household) on whether the individual has plans to move <i>residence</i> in the future. See HILDA for good example.</p>
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Question	Code list	Notes	Modelled on	Implications & problems
2) Migration Module I (General migration)				
Place of birth	Town/place name Magisterial district Province Country (if not RSA)	This question could be divided into 3 questions, as in the 2001 Census: i) Was ... born in SA? ii) If yes, where? iii) If no, in what country?	Single question found in OHSs (e.g. 1996)	
How best would you describe this place?	Possible codelist take from OHS 1997 (Section 7) Rural area Urban area Squatter inside urban area Squatter next to urban Squatter in rural area Commercial farm Other	Question is useful because retrospective post-coding is not possible.	OHS 1997 IFLS MxFLS	
Since ... was born, has he/she... ever lived anywhere other than here i.e. in this place/area? If no, then go to the next module. If yes, then continue.	Yes/No	Ask of all RESIDENT household members Emphasise: We are collecting information on change of PLACE here – not change of house or suburb within a place/town/city.		Note – this means that we would not be collecting this information about migrant workers and other non-resident household members. (Is it likely that this information about absent household members

				could be provided by resident household members?)
<p>Option 1: Identify all moves since time of birth using a life history calendar</p> <p>Option 2: Identify place of residence at 12 years old and all moves since age of 12 years using a life history calendar (see IFLS and MxFLS)</p> <p>Option 3: Identify all moves since 1990 using a history calendar (time period chosen to identify possible increased mobility over post-apartheid decade).</p>				
<p>Standard: Collect information on year moved, and to where.</p> <p>Consider including (for each move) a question that asks the individual to describe the type of area (e.g. rural/urban/squatter etc, see question example above).</p>		<p>To be considered:</p> <p>a) Should information be collected on <i>major</i> moves only?</p> <p>b) If yes, <i>what defines a major move?</i> Crossing a magisterial district boundary or a provincial boundary?</p> <p>c) If district, will respondents be able to identify these districts? Place/town/city name may be more appropriate.</p> <p>d) Do we need to stipulate a length of stay for the move to be included here? So for e.g., the Lucas (2000) template uses 3 months, IFLS uses 6 months or more, MxFLS uses a year or more.</p> <p>Question is recommended because retrospective post-coding is not possible. May be useful in identifying whether rural to urban flows still predominate in SA.</p>		<p>Problem of recall bias: The extent of this bias can be estimated by recollecting the migration history in a subsequent wave.</p>

<p>Additional questions for move to current residence/dwelling only: More detailed information on reason for move, with whom the person moved, if there was anyone living there already that the person knew. Also consider collecting information on expectations of migration in the future.</p> <p>These have been outlined earlier: see 'Additional questions to consider' under Section 1.3 above on general migration.</p>				
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Question	Code list	Notes	Modelled on	Implications & problems
3) Migration Module II: (Labour migration and remittances)				
Note: How labour migrants are identified here, and what questions are included, will depend on <i>which definition of the household is adopted in the household roster and demographic data module.</i>				
<p>Option 1 If the broad definition is used, then non-resident household members (i.e. those whose person code has <i>not</i> been ringed) who are away for work reasons need to be linked here.</p> <p>Option 2 If the narrow definition is used, then additional questions need to be included asking respondents to identify migrant workers and their characteristics.</p>		<p>Information to be collected with option 2 includes:</p> <ul style="list-style-type: none"> - age -education - relationship to h/hold head - gender - marital status - spouse/partner living in household (yes/no and person code) 	<p>OHS LFS</p>	<p>Note: The definition of a migrant worker must be consistent throughout the instrument, whether migrants are being identified in the sending or destination household.</p> <p>Key is the <i>period of time</i> an individual can be away for and be considered a migrant worker. SA surveys typically specify "one month or more". But note the following:</p> <ul style="list-style-type: none"> • If migrants are non-resident members, and if residency is defined as "usually resident for at least 4 nights of the week", then this would mean that information could be captured twice for short-term migrants.

Where did move to when he/she first left this household?	1-9: Province code list 10: Another country			
How best would you describe this place?	Possible codelist take from OHS 1997 (Section 7) Rural area Urban area Squatter inside urban area Squatter next to urban Squatter in rural area Commercial farm Other	Question could be useful given variation in area type within sub-place.	OHS 1997 IFLS MxFLS	
Does ... still work or stay there?	Yes (skip next two questions) No (continue)			
In which province does ... work or stay now ?	1-9: Province code list 10: Another country		OHSs/LFSs	This will only capture current residence of migrant and not the place to which they first migrated.
How best would you describe this place?	Possible codelist take from OHS 1997 (Section 7) Rural area Urban area Squatter inside urban area Squatter next to urban Squatter in rural area Commercial farm	Question could be useful given variation in area type within sub-place.		

	Other			
How long has ...been a migrant worker?	6 options ranging from less than a year to 5 years or more; or extended options beyond 5 years?		LFS 6, 8, 10	
When (the migrant worker) left this household, did ... leave on his/her own or with someone else from this household?	-On own -With others. (If yes, record person code of any absent household members.)	"Co-migrants " might not still be identified as household members.		
Does ... have children (15 years or younger) that stay in this household?	Yes No (skip to next question)		LFS 6, 8, 10, 12	
Option 1: How many are they? Option 2: If yes, write down person codes of children.		Are we interested in both <i>number</i> of children and <i>identifying who they are</i> in the household?	Option 1: LFS 6, 8, 10, 12	
How often does... come home?	-Weekly -Twice a month -Monthly -Once in 6 months -Once a year -Less frequently		LFS 8	
When last did you communicate with ... (for e.g. by phone, mail, etc)?	-In the last week -In the last month - One month to six months ago - Six months to a year ago - More than a year ago			
Isworking or is he/she unemployed?	-Employed -Unemployed			

	- Don't know			
<p>What kind of work is ... doing as a migrant worker? (Describe the type of work in as much detail as possible.)</p> <p>What is the main activity of ... firm, institution, or private employer. (Describe the activity in as much detail as possible.)</p>	Post-coded as for employment module		OHS 1996-1999	Although it may be difficult for respondents to report accurately on this, the information is useful for understanding remittance propensities.
<p>Questions on money remittances for each (individual) migrant worker:</p> <p>Has ... sent or given any money to this household in the last 12 months?</p> <p>If yes, ask:</p> <ul style="list-style-type: none"> -To which individual in the household was this money sent or given? If received for use by entire household, code as 88. -How much money in total has the person/household received from ... over the last 12 months? <p>Has ... sent or given any money to this household in the last month?</p> <p>If yes, ask:</p> <ul style="list-style-type: none"> -To which individual in the household was this money sent or given? If received for use by entire household, code as 88. -How much money has the person/household received from ... in the last month? 			LFSs 6, 8, 10, 12 PSLSD	Should income bands be provided here?
<p>Question on in-kind remittances for each separate migrant worker:</p> <p>Has ... sent or given food, clothes or any other goods to this household in the last 12 months?</p>			LFSs 6, 8, 10, 12 PSLSD	Again – should income bands be provided here?

<p>If yes, ask: -To which individual in the household were these goods sent or given? If received for use by entire household, code as 88. -What is the total value of the goods the person/household received from ... over the last 12 months?</p> <p>Has ... sent or given food, clothes or any other goods to this household in the last month?</p> <p>If yes, ask: -To which individual in the household were these goods sent or given? If received for use by entire household, code as 88. -What is the total value of the goods the person/household received from ... over the last month?</p> <p>How often does ...send or bring money home to the household?</p>	<ul style="list-style-type: none"> -More than once a month -Once a month -Less than once a month, but more than once a year -Once a year -Less often than once a year 		<p>OHS 1999</p>	
<p>If money is sent home, what is it usually spent on?</p>	<ul style="list-style-type: none"> -Nothing specific, money goes into the general income pool -Food -Education -Clothing -Transport 	<p>Multi-options allowed</p>	<p>Similar to CAPS, IFLS (Also in Agincourt template as an open-ended question.)</p>	<p>Problematic as use of income is fungible – the first response option attempts to deal with this.</p>

	<ul style="list-style-type: none"> -Purchase agricultural inputs (seed, fertiliser, tools etc) -Pay off debts -Purchase furniture, appliances (e.g. stove, TV) -Savings scheme -For emergencies -Informal activity/family business -Other 			
<p>Does anyone in this household send or give money or goods to ... (the migrant worker)?</p> <p>If yes,</p> <p>Which individual in the household sends this money? Write person code of individual. If more than one person/entire family, code as 88.</p> <p>What is the total value of the money and goods sent or given to in the last month?</p> <p>What is the total value of the money and goods sent or given to in the last 12 months?</p>		Do we want to identify the individual sender of the transfer?		<p>This module would only collect information on transfers/remittances made to and from migrant workers.</p> <p>Elsewhere in the questionnaire, there should be a module on other kinds of transfers made to the household (even from non-household members e.g. children supporting parents) and from the household to others who are not migrant workers.</p>

6.2 Data issues and questions for subsequent waves

The choice of household definition and questionnaire structure in the first wave will, of course, determine the questions asked in the second and subsequent waves. To a large extent, the questionnaire template provided above can be used in the subsequent waves. The main changes will occur in the household roster section, where household membership needs to be re-established. To avoid repetition, in this section we briefly consider how the questionnaire might *change* in the subsequent waves, and some key issues that need to be considered when collecting panel data on migration.

1. Identifying household membership in subsequent waves:

Once the original household (or part of it) has been tracked, identifying membership in the household correctly is key to collecting good (labour) migration information. Two useful examples can be found in the Household, Income and Labour Dynamics in Australia survey (HILDA) and the CAPS survey household rosters where:

- updated information for members on the previous roster is collected **and**
- information on any new members that have joined is collected **and**
- reasons for exit of any of the original members and place to which they have migrated are recorded (will these members be tracked to their new households in the panel?).

If the PSLSD route is followed, where a broad definition of the household is used and where codes were assigned in Wave 1 for resident and non-resident household members, then the same questions on length of absence, reason for absence need to be asked of all members of the household, old and new. **Note:** for non-resident migrant household members in Wave 1, this should include asking whether they are still part of the household.

This first set of questions must allow the interviewer to assign one of the following codes to each member of the household.

Household members' Wave 2 status (similar breakdown used in the second wave of HILDA):

Those who were in Wave 1 household:

1. Resident household member
2. Non-resident/absent for more than 6 months (*wording depends on residency requirement used in Wave 1*)
3. Moved and/or no longer a member
4. Deceased

Not in Wave 1 household:

5. Resident household member
6. Non-resident/absent for more than 6 months (*wording depends on residency requirement used in Wave 1*)

2. Collecting information on household members in the household roster:

The information that would need to be collected on the exit and entry of old and new members of the household is also useful in understanding the movement of individuals across households/space and over time.

Finding out about new members (codes 5 and 6 from above):

When did they join the household?

Why did they join?

Where were they living before?

Finding out about leavers (codes 3 and 4):

When did they leave?

Why did they leave? (And did they leave alone?)

Where have they moved to? (If they are eligible for tracking, detailed information would be collected on place of residence.)

Add/update **key demographic information for all members** now in the household (resident and non-resident, i.e. **codes 1, 2, 5 and 6**).

But collect **more detailed individual information only for those who are currently resident** in the household (**codes 1 and 5**).

Note: Another reason for preferring the PSLSD method of capturing resident and non-resident members in the household roster is that person codes would have been allocated to all resident and non-resident members in the first wave. This means that in subsequent waves, the interviewer, with a pre-printed copy of the household roster in hand, will be able to refer more easily to individuals who were considered members of the household in Wave 1 even if they did not spend most of their time in that household. If the stricter household definition is used, with labour migrants only identified later on in the questionnaire (the OHS/LFS method), it will be harder for the interviewer to identify/refer to the labour migrant/s that were part of the household in Wave 1 to ascertain whether they are still a part of the household in Wave 2.

3. Establishing relationship to the household head in subsequent waves:

An important point to consider is whether the household head should be allowed to change in subsequent waves (following death, migration, or changes in household

earnings dynamics for example). Or should the relationships be coded in relation to the original head in subsequent waves, to give consistency over time?

4. Possible inclusion/exclusion of questions:

In the subsequent waves some flexibility should be allowed in adding new questions to the questionnaire, as the research agenda changes and as the previous wave's data are analysed to see how the questions performed.

There are some areas where one can economise however. The life histories on migration need not be collected in subsequent waves, only information on the moves since the last wave should be recorded.

Having said this, a decision would need to be made for **new household members**. Should entire life histories be collected for new household members or just information on place of birth and last move before moving to current residence/household, for example?

It may also be useful to recapture migration life histories in one of the subsequent waves (not necessarily the second) to measure the extent of recall bias.

The questions on migration expectations under the general migration module would not need to be included yearly or in every round, but perhaps in alternate rounds (depending on the time lapse between surveys).

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APPENDIX: Summary of existing questions on migration in South African instruments.

	Household definition	General migration	Labour migrant identification (Household of origin/destination)	Remittances sent/received
Census 1996	People 'present in this household at night between Wed 9 Oct and Thurs 10 Oct 1996'. People who are absent overnight (e.g. people working, travelling, at a church vigil, at an entertainment venue) should be included in the household if they return to it on Thurs 10 Oct, without being counted elsewhere.'	<p>QA.8.1. 'Was the person born in South Africa (include TBVC states)?'</p> <p>QA.8.2. If no: 'In what country was the person born?'</p> <p>QA.11.1. 'Is this dwelling the place where (the person) usually lives, i.e. where (the person) spends at least four nights per week?'</p> <p>QA.11.2. 'Where does this person usually live?' (See code for Q12.2)</p> <p>QA12.1 'In which year did (the person) move to the dwelling where he/she usually lives?'</p> <p>Q12.2 'From where did the person move?'</p> <p>-Name of suburb/village/settlement -Name of city/town/farm/tribal authority -Name of magisterial district -If not South Africa, state name of country</p>	<p>Destination? (If they answered yes to QA.10. below and yes to QA.11.1)</p> <p>QA.10. 'Is (the person) a migrant worker? (Someone who is absent FOR MORE THAN A MONTH each year to work or to seek work.)'</p> <p>Origin? (If they answered yes to QA.10. above and no to QA.11.1?)</p> <p><i>And later</i></p> <p>Origin QB.1.3. 'Are there any persons who are usually members of this household, but who are away for a month or more because they are migrant workers? (A migrant worker is someone who is absent from home for more than a month each year to work or to seek work.)'</p>	Received (at household level) QB1.2. 'If this household receives any remittances or payments (for example money sent back home by someone working or living elsewhere or alimony). Please indicate the total received during the past year. (1 Oct 95 – 30 Sept 1996)'
Census 2001	As in 1996.	<p>First 4 questions as in 1996. QP -09, QP -09a, QP -09b, QP -11, QP -11 a - Extra question asked on 'In which province was (the person) born?'</p> <p>- In code list for place, province is used instead of magisterial district.</p> <p>QP-12 'Five years ago (at time of Census '96) was (the person) living in this place (i.e. this suburb, ward, village, farm, informal settlement)?'</p> <p>QP-12a 'Where did (the person) move from?' Code list for place used.</p> <p>QP-12b 'In which year did (the person) move to this place?' Options 1996– 2001, If more than one move, write the code for the year of last move.</p>	<p>Origin/destination? VERY RESTRICTIVE, possibly capturing commuters? QP19e and f 'Does (the person) work in the same sub-place in which s/he lives?'</p> <p>'If no, where is this place of work?'</p> <p>-Code list for place used.</p>	-
OHS 1995	Flap '...every person who normally resides at least 4 nights a week in this household.'	<p>Q2.7 'Place of birth: State town/place name, province and country.'</p> <p>Q2.8 'Did ...move into this area after 1 October 1994? If yes, from where? State town/place name, province and country.'</p>	<p>Destination Q2.14 'Is ... a migrant worker (that is a person working or looking for work away from what they consider "home")?'</p>	-
OHS 1996	Section 1 'By household we mean a person or a group of persons who live together at least four nights a week at the same address, eat together and share resources.'	<p>Q2.9 'Place of birth: Town/place name, magisterial district, province and country.'</p> <p>Q2.10 'In which year did (the person) move to the dwelling where he/she usually lives?'</p> <p>'For the person who has moved.</p>	<p>Origin Q4.1 Are there any persons who are usually regarded as members of this household, but who were away for a month or more in the last year because they are migrant workers?'</p> <p>(A migrant worker is someone who is absent from home for more than a month each year to work or</p>	Received (at household level) Q4.7 'How much money if any has (the person) given to this household during the past 12 months.'

		From where did the person move? Town/place name, magisterial district, province and country.'	seek work).	
OHS 1997	Flap '...every person who normally resides at least 4 nights a week in this household.'	Section 7: Must be completed for the head or acting head of household. Q7.1 'Have you lived here since birth?' If no: Q7.2 Present residence Q7.3 Previous residence (before 7.2) Q7.4 Previous residence (before 7.3) Q7.5 Residence at birth For each question: -Name of place -Nearest town/city -Magisterial district -Province and Country -Type of place (rural area/urban area/squatter inside urban area/squatter next to urban area/squatter in rural area/commercial farm/other -Date of arrival (year) -Main reasons for leaving previous place of residence (Marriage related reasons/work related reasons/moved to a new house/could no longer afford to pay rent/Evicted by owner of former house/lest to escape crime or violence/Lack of land/Political reasons/Other reasons)' <i>See question for more details in question wording</i>	Origin Q5.1 'Are there any persons who are usually regarded as members of this household, but who are away for a month or more because they are migrant workers?' (A migrant worker is someone who is absent from home for more than a month each year to work or to seek work).'	Received (at household level) Q5.8 As in OHS 1996 Received (at individual level) 'During the past year (12 months) did (the person) get income from any of the following sources? (Yes/No and state annual amount)' Q4.10 'Remittance/financial support from relatives/persons not in the household'
OHS 1998	As in OHS 1997	Q7.1 – Q7.5 As in OHS 1997	Origin Q5.1 As in OHS 1997	Received (at household level) Q5.8 As in OHS 1996 Received (at individual level) Q4.10 As in OHS 1997
OHS 1999	As in OHS 1997	-	Origin 'A migrant worker is someone who is absent from home for more than a month each year to work or to seek work. Working includes self-employment as well as working for someone else. Q5.1 Are there any persons who are regarded as members of this household, but who are away for a month or more because they are migrant workers?'	Received (at individual level) Q4.10 As in OHS 1997 (yes/no, but no actual amount.) Received (at household level) Q5.8 'How often does ... send or bring money to the household?' -More than once a month -Once a month -Less than once a month, but more than once a year -Once a year -Less often than once a year'
LFS 2	<i>Flap: The following information must be obtained in respect of every person who normally resides in this household at least four nights a week.</i> B. Has stayed here for at least four nights on average per week during the last four weeks? 1 = YES 2 = NO @ END OF QUESTIONS FOR THIS PERSON	-	-	Received (at individual level) 'During the past year (12 months) did get income from any of the following sources?' Of which an option is: 'Q6.11 Remittance/financial support from persons not in the household?' Yes/No/Don't know
LFS 6	As in LFS 2	QB.2 'Did stay in this household in September	Origin	Received (at household level)

		2001?' Yes/No	<p>'I am now going to ask about other members of this household who are away because they are migrant workers.'</p> <p>Q6.1 'Are there any persons who are usually regarded as members of this household, but who are usually away for a month or more because they are migrant workers?</p> <p>A migrant worker is someone who is absent from home for a month or more to work or to seek work'</p>	<p>Q6.12 'How much money has.....given to this household in the last 12 months?'</p> <p>Q6.13 'What is the value of goods has.....given to this household in the last 12 months?'</p> <p>Q6.14 'What is the value of both goods and money has..... given to this household last month?'</p> <p>Cash contributions made to other households</p> <p>Q7.28 'In the past 12 months, did the household, or a household member, make any cash contributions to a member/ members or relatives of the family, who is/are not part of this household?'</p> <p>Q7.29 'What is an estimated total value of those cash contributions?'</p> <p>Q7.30 'In the past 12 months, did the household, or a household member, make any contributions in kind to a member or members of the family, who is/are not part of this household?'</p> <p>Q7.31 'What is an estimated total value of those in kind contributions?'</p>
LFS 8	As in LFS 2	<p>QB.2 'Did stay in this household in March 2003?' Yes/No</p> <p>Q1.3 'Five years ago (in September 1998), was ... living in this area (i.e. this suburb, ward, village, farm, informal settlement)?'</p> <p>Q1.4 'Where did ... move from?'</p> <p>(If more than one move, give details of the last move)</p> <p>Province Main place (e.g. city, town, tribal area, administrative area, etc) If from another country, name country</p> <p>Q1.5 In which year did ... move to this place?</p>	<p>Origin As in LFS 6</p>	<p>Received (at household level)</p> <p>Q6.13, Q6.14, Q6.15</p> <p>As in LFS 6</p> <p>Cash contributions made to other households</p> <p>Q7.32, Q7.33, Q7.34, Q7.35</p> <p>As in LFS 6</p>
LFS 10	As in LFS 2	<p>QB.2 'Did stay in this household in March 2004?'</p> <p>Q1.3 'Five years ago (in September 1999), was ... living in this area (i.e. this suburb, ward, village, farm, informal settlement)?'</p> <p>Q1.4 and Q1.5 as in LFS 8</p>	<p>Origin 'This section covers information on migrant workers (persons who are separated from the household for more than 5 days on average a week in the past 4 weeks)</p> <p><i>Read out:</i> I am now going to ask about other members of this household who are away because they are migrant workers.'</p> <p>Q6.1 'Are there any persons who are usually regarded as members of this household, but who are usually away for a month or more because they are migrant workers?'</p>	<p>Received (at household level)</p> <p>Q6.13, Q6.14, Q6.15</p> <p>As in LFS 6</p> <p>Cash contributions made to other households</p> <p>Q7.33, Q7.34, Q7.35, Q7.36</p> <p>As in LFS 6</p>

LFS 12	As in LFS 2	<p>QB.1 'Was part of this household in March 2005?'</p> <p>Q1.3 'Five years ago (in September 2000), was ... living in this area (i.e. this suburb, ward, village, farm, informal settlement)?'</p> <p>Q1.4 and Q1.5 as in LFS 8</p>	As in LFS 10	<p>Received (at household level)</p> <p>Q7.15, Q7.16, Q7.17</p> <p>As in LFS 6</p>
PSLSD 1993	<p>Household definition Individuals who meet all 3 of following criteria: (i)They live under this "roof" or within the same compound/homestead/stand at least 15 days out of the past year and (i)When they are together they share food from a common source and (i)They contribute to or share in a common resource pool</p> <p><i>(Key demographic information collected.)</i></p> <p>Residency requirement Q12. 'Has ... lived under this roof for more than 15 days of the last 30 days?'</p> <p><i>(If yes, Section 2-11 answered for that person)</i></p>	<p>Asked of all resident and non-resident members:</p> <p>Q13 'Did ... move here during the past 5 years?'</p> <p>Q14 'If yes, where was ...'s last place of residence?'</p> <ul style="list-style-type: none"> -one of the metropolitan areas -urban/rural in each province -homeland -another African country -other (specify) 	<p>Origin Q10 'How many months did ... spend away from the household in the last 12 months?'</p> <p>Q11 'What is the reason for his/her absence?'</p> <p>-Employment -Looking for employment -Schooling -Student -Personal reasons -Escape violence or political problems -Visiting spouse or family -Visiting friends -Living with other partner -Prison -Vacation -In hospital or clinic -Away on business -National service -Other</p>	<p>Received (at household level) Q6.1 'Income received from absent members of the household or any other person.' Are there any members of this household who have been away for more than half of the last month, (or any other persons) who send money or food, or make any other kind of contribution to this household?'</p> <p>If yes, -Name of person -Where is ...now? (codes as in Q14) -What is the relationship to any member of the household?' (relationship, person name, person code) -In the past 12 months did ... send or give any money to the household? (Number of times? How much in total in the past 12 months? How much in the past 30 days?) -In the past 12 months, did ... make a contribution in kind to the household? (Number of times? Total value in the past 12 months? Total value in the past 30 days?)</p> <p>Sent (from household to individuals/family) Q6.2 'Are there any members of this household who have been away for more than half of the last month, (or any other persons) who have received money, food, or any other assistance from this household in the past 12 months?'</p> <p>If yes, same questions as above in section 6.1. Migrant worker is given option of stating support of entire family, rather than individuals.</p>
KIDS 1998	<p>Household definition As in PSLSD 1993 (i.e. 3 criteria). Persons from 1993 household roster and new members</p> <p>Residency requirement As in PSLSD 1993 (i.e. lived more than 15 days out of the last 30 under this roof.)</p>	-	<p>Not clear how to distinguish migrant workers from other non-household members with links or other household members who have not spent 15 of last 30 days in the household? See pages 4-15</p> <p>Only possible to identify someone who is remitting.</p>	<p>Received (at individual level) 5.1 Income received from non-resident members and non-household members. 1. 'Are there any people who are not resident household members who send money, food, or any other kind of contribution to this household (I.E., RECEIVED BY A RESIDENT HOUSEHOLD MEMBER)?'</p> <p>NOTE: MONEY OR IN KIND LOANS WHICH ARE EXPECTED TO BE REPAID SHOULD BE INCLUDED IN SECTION 4.4, NOT HERE'</p> <ul style="list-style-type: none"> -Name -Contributor's person code -Where is ...now? (Metro areas/In the community/Other urban/rural area in KZN/SA/another African country)

				<p>-Who in the household received the transfer? -What is ...'s relationship to receiver? -In the past 12 months did ...send or give money to the household? (Number of times? How much in total in the past 12 months? How much in the past 30 days? -In the past 12 months, did ... make a contribution in kind to the household? (Number of times? Total value in the past 12 months? Total value in the past 30 days?)</p> <p>Sent 5.2 Non-Resident Household Members and Non-Household Members Who Received Contributions from the Household</p> <p>1. 'Are there any people who are not resident household members who receive money, food, or any other kind of contribution from this household (I.E., SENT BY A RESIDENT HOUSEHOLD MEMBER)?'</p> <p>If yes, same questions as above in section 5.1. Also codes of individuals receiving and codes of people contributing as above.</p>
KIDS 2004	<p>Household definition As in PSLSD 1993 (i.e. 3 criteria). Persons from 1993 and 1998 household roster and new members</p> <p>Residency requirement As in PSLSD 1993 (i.e. lived more than 15 days out of the last 30 under this roof.)</p>	-	<p>Not clear how to distinguish migrant workers from other non-household members with links or other household members who have not spent 15 of last 30 days in the household? See pages 7-18</p> <p>Only possible to identify someone who is remitting.</p>	<p>Received(at individual level) 5.1 'Income received from non-resident household members and any other person. 1. Are there any people who are not resident household members (THOSE NOT CIRCLED ON THE HOUSEHOLD CARD) who send money, food, or any other kind of contribution to this household (I.E., RECEIVED BY A RESIDENT HOUSEHOLD MEMBER)?' -Name of contributors -Who in the household received the transfer and controlled its spending? Person code -How is ...related to the recipient? -Questions on money and in kind transfers as in KIDS 1998</p> <p>Sent (at individual level) 5.2 'Non-Resident Household Members and other people Who Received Contributions from the Household 1. Are there any people who are not resident household members who receive money, food, or any other kind of contribution from this household (I.E., SENT BY A RESIDENT HOUSEHOLD MEMBER)?' -Receiver's name -Who in the household gave the transfer (person code) -How is ... related to the sender? - Questions on money and in kind transfers as in</p>

<p>CAPS Wave 1 2002</p>	<p>Eligible sample: young adults aged 14-22 in Cape Town metro area and their households.</p> <p>A.2 'Beginning with yourself, please tell me the names of the people who usually live in this household. (If unsure then note that "usually live here" means the person has lived under this roof for more than 15 days of the last 30days)"</p> <p>And then later:</p> <p>A.54. "Are there any people such as small children or infants, foster children or other people who usually live with you in this household that we have not listed? If yes, go back to household roster.</p>	<p>Household questionnaire</p> <p>A.21 "Was (NAME) born in an urban or rural area?"</p> <p>A.22 "Where was (NAME) born?" (Province and country)</p> <p>A.23 "What year did (NAME) first move to Cape Town?"</p> <p>A.24 "What year did (NAME) move into this residence?"</p> <p>Young adult questionnaire</p> <p>B.1 Household relocation history</p> <p>Changes in residence from birth to 2002 using life history calendar questions</p> <p>J.22 "Do you consider yourself a member of any other household besides this one?"</p> <p>Migration expectations</p> <p>J.23 "What do you think are the chances that you will still be living in CT three years from now?"</p> <p>J.24 "Where do you think you will be living 3 years from now?"</p>	<p>Didn't collect information on labour migration from origin as CT is a place to which people would migrate.</p>	<p>KIDS 1998</p> <p>-</p>
<p>CAPS Wave 2a 2003</p>	<p>Module C: "Last year we were told that you lived with the following people. Do any of these people usually live with you now, here at this address? By 'usually', we mean that they lived here for more than 15 out of the last 30 days. If not, can you please tell us why not. Please correct any information that is incorrect."</p> <p>C1-11: Information collected on 'original' household members .</p> <p>C12: "Does anyone else live in this household now, who is not listed on the previous page?"</p> <p>C.13-24: Demographic information collected on new members .</p>	<p>Module B: Questions on new residence if respondent no longer at previous address.</p>	<p>QB.9-11 Possible to identify whether young person moved to work or look for work, by him/herself and with which other people".</p>	
<p>CAPS Wave 2b 2004</p>	<p>As in Wave 2a above.</p>	<p>Module B: Similar questions as in Wave 2a on if person moved, how many times, why, when and with whom?</p>	<p>QB.1-5 Possible to identify whether young person moved to work or look for work, by him/herself and with which other people".</p>	
<p>CAPS Wave 3 2005</p>	<p>As in Wave 2a above</p> <p>Code list for "Why not in household?" asked of all original members:</p> <ul style="list-style-type: none"> -Deceased -Stayed at old residence -Went to prison -Went to hospital/nursing home -Moved because of a job -Moved out to go to university /technikon -Moved out to go to school -Moved out because of dispute or break-up of relationship -Moved out to get married or live with partner -Moved out to look for work 	<p>Young adult questionnaire</p> <p>B5-8 updates life history on place and year of residence</p>	<p>QB.14-18 Possible to identify whether young person moved to work or look for work, by him/herself and with which other people".</p>	<p>Income transfers received (individual level)</p> <p>F.1 Did anyone in this household receive money or goods from someone outside the household in the last 12 months?</p> <p>F.2 Which person received this money or goods?</p> <p>If one person is the primary recipient, put the line number of that person. If the transfer is for more than one person, put 88.</p> <p>F.3 How is the person who sent the transfer related to the person who received it?</p> <p>F.4 About how old is the person who sent the transfer?</p> <p>F.5 Where does sender live? (province)</p> <p>F.6 How many times did you receive this transfer</p>

	<ul style="list-style-type: none"> -Moved abroad -Other -Don't know 			<p>in the last 12 months? F.7 What was the Rand value of the usual transfer (if goods were sent, think of how much it would cost to buy those goods)? F.8 What was the main use of the money or goods? (School fees or expenses/Child support/Funeral expenses/Medical expenses/Help to buy a house/Help to start a business/General living expenses/Other /Don't know)</p> <p>Income transfers sent (individual level) Same set of questions as above</p>
CAPS Wave 4 2006	As in Wave 2a above.	B 2-7: Similar questions as in Wave 2a on if person moved, how many times, why, when and with whom?	<p>QB.2-7 Possible to identify whether young person moved to work or look for work, by him/herself and with which other people".</p> <p>In the older adult (50 years +) questionnaire, module on links with Eastern Cape. e.g. QE.12 "Are you planning to go back to the Eastern Cape to live permanently at some point in your life?"</p>	<p>Income transfers received (individual level) QF1-F8 as in Wave 3 above Added question F.9 "Do you consider this transfer as a loan that must be repaid?"</p> <p>Income transfers sent (individual level) QF.10 – F.17 as in Wave 3 above. Added question F.18 "Do you consider this transfer as a loan that must be repaid?"</p> <p>In young adult questionnaire questions G15.1 to 17.1 ask more specific questions on individual financial support received from and provided to people outside the household.</p> <p>Similar questions asked in the older adult questionnaire.</p>
Agin-court DSS – 2001 rounds	<ul style="list-style-type: none"> -All people who eat out of the same pot. -All people identified by respondents as household members as long as they had been resident at least one night in the twelve months prior to the survey -For each household member no. of months spent in household is recorded as well as reason for absence. <p>Permanent members are required to have lived in the household for between 6 and 12 months.</p> <p><i>Note: An additional module on labour migrants was going to be introduced in 2002/3, but we have been unable to get copies of the questionnaires for the Agincourt DSS rounds, as they are not in the public domain.</i></p>	<p>Records both individual and entire household migration; name of person causing household move; from where if in -migration; to where if out-migration (village, placename, province); date of move; reason for move; if job-related, sector of work.</p> <p>Code list for reason for move:</p> <ul style="list-style-type: none"> -Job found -Job lost -Looking for work -Other work related -Missed individual -Never resident -New marriage -Divorce -Widowed -Separated -Other marriage reason -Pregnancy/delivery -Child returning to parent -Returning Mozam/refugee -New Mozam/refugee -School/study -New house -Accompanying family member -Household move -Other 	<p>Origin Labour migrant is identified as someone who is present for less than 6 months of a year and reason for absence is work-related.</p>	-

Migrant characteristics: personal/demographic						
	Name	Age	Gender	Relationship to head of household	Marital status	Children
Census 1996 (origin)	-	QB.1.3	QB.1.3	QB.1.3 Full set of relationship codes.	-	-
Note: In Census 1996, for migrants picked up at destination , all information collected on characteristics of resident members available.						
OHS 1995	For migrants picked up at destination , all information collected on characteristics of resident members available.					
OHS 1996	Q4.2	-	Q4.4	Q4.3 Head/Other household member	-	-
OHS 1997	Q5.2	-	Q5.4	Q5.3 As in OHS 1996	-	-
OHS 1998	Q5.2	-	Q5.4	Q5.3 As in OHS 1996	-	-
OHS 1999	Q5.2	Q5.4	Q5.3	-	-	-
LFS 6	Q6.2	-	Q6.4	Q6.3 Head/Other household member	Q6.5 'What is 's present marital status?' Q6.6 'Does 's spouse/partner live in this household?'	Q6.7 'Does ... have children 15 years or below who stay in this household?' Q6.8 'How many are they?'
LFS 8	Q6.2	-	Q6.4	Q6.3 As in LFS 6	Q6.5 Q6.6 As in LFS 6	Q6.7 Q6.8 As in LFS 6
LFS 10	Q6.2	-	Q6.4	Q6.3 As in LFS 6	Q6.5 Q6.6 As in LFS 6	Q6.7 Q6.8 As in LFS 6
LFS 12	Q7.3	-	Q7.5	Q7.4 As in LFS 6	Q7.6 Q7.7 As in LFS 6	Q7.8 Q7.9 As in LFS 6
PSLSD 1993	Q2	Q5	Q4	Q3 Extensive set of 19 codes Q8 'If the father of ... lives here, write father's code; if absent, 99; if deceased, 88.' Q9 'If the mother of ... lives here, write mother's code; if absent, 99; if deceased, 88.'	Q7 'If the spouse of ... lives here write the spouse code. If absent, 99; if deceased, 88; or record no spouse'	-

Migrant characteristics: Education and employment, etc					
	Education	Employment status	Where is person living (i.e. in destination household)	Length of migration spell	Visits home
Census 1996 (origin)	-	-	QB.1.3 -Name of suburb/village/settlement -Name of city/town/farm/tribal authority -Name of magisterial district -If not South Africa, state name of country	-	-
Note: In Census 1996, for migrants picked up at destination , all information collected on characteristics of resident members available.					
OHS 1995	For migrants picked up at destination , all information collected on characteristics of resident members available.				
OHS 1996	Q4.6	Q4.5 'What kind of work is (the person) doing as a migrant worker? (Describe the type of work in as much detail as possible.) Q4.9 'What is the main activity of (the person's) firm, institution, or private employer. (Describe the activity in as much detail as possible.)'	Q4.8 'Where does/did (the person) work?' Town/placename, magisterial district, province, country.'	-	Q4.10 'How often does (the person) come home?' Every weekend/About once in two weeks/About once a month/About once in three months/About once in 6 months/About once a year/Less frequently than once a year'
OHS 1997	Q5.6 and Q5.7 (On schooling and tertiary education)	Q5.5 and Q5.10 As in OHS 1996	Q5.9 As in OHS 1996	-	Q5.11 As in OHS 1996
OHS 1998	Q5.6 and Q5.7 As in OHS 1997	Q5.5 and Q5.10 As in OHS 1996	Q5.9 As in OHS 1996	-	Q5.11 As in OHS 1996
OHS 1999	-	Q5.5 and Q5.6 As in OHS 1996	-	-	Q5.7 As in OHS 1996
LFS 6	Q6.9 "What is the highest level of education that ... has completed?"	-	Q6.10 'Where does ... work or stay?' Province code list	Q6.11 'How long has ...been a migrant worker?' 6 options ranging from less than a year to 5 years or more.	-
LFS 8	Q6.9 As in LFS 6	-	Q6.10 As in LFS 6	Q6.11 As in LFS 6	Q6.12 'How often does... come home?' Weekly/Twice a month/Monthly/Once in 6 months/Once a year/Less frequently
LFS 10	Q6.9 As in LFS 6	-	Q6.10 As in LFS 6	Q6.11 As in LFS 6	Q6.12 As in LFS 8
LFS 12	Q7.10 As in LFS 6	-	Q7.11 'Where does ...stay?' Private dwelling/Worker's hostel/Hotel, motel, B&B/No fixed location (e.g. construction site), Other (specify) Q7.12 'Where does ...work or stay?' Province code list	Q7.13 As in LFS 6	Q7.14 As in LFS 8
PSLSD 1993	Q6	-	-	-	-