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Questionnaire design of the revised Human Values Scale for cross-cultural surveys

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europeansocialsurvey.org

ESS is a European Research Infrastructure Consortium (ESS ERIC)



Context for this presentation

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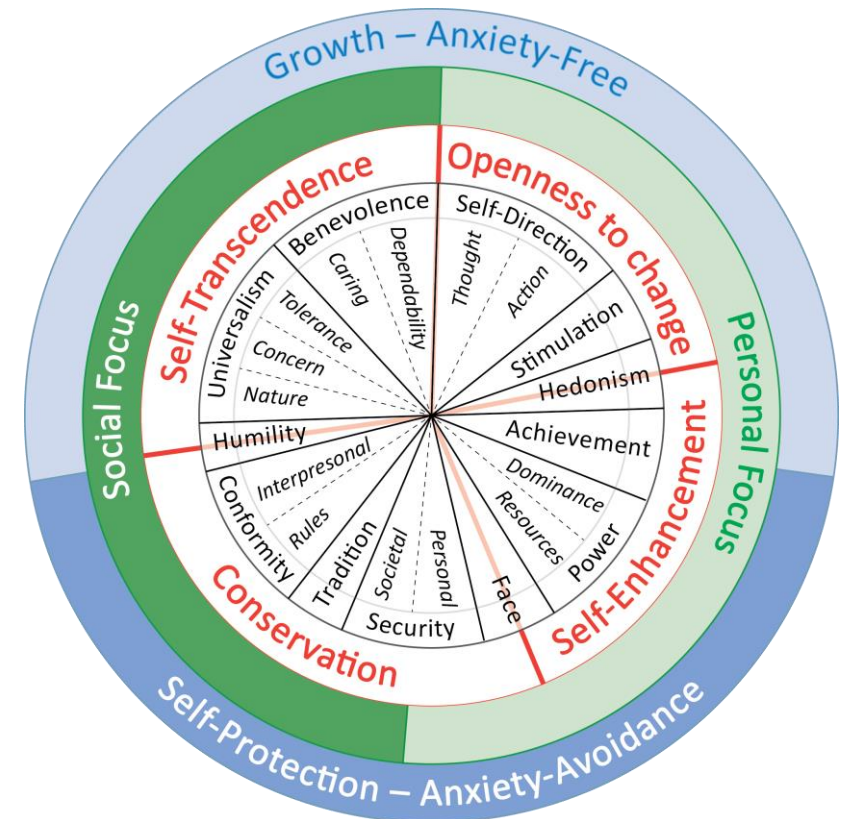
- Presentation concerns the Schwartz Human Values Scale that has been included for the European Social Survey (ESS) since its first round in 2002 and for several other studies
- Recent review of the scale in consultation with Shalom Schwartz – has involved collaboration between the ESS and German Socio-Economic Panel (SOEP)
- I will share information from both surveys regarding review and testing of a new Human Values Scale before drawing some conclusions

Background – the Schwartz Human Values Scale

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- Schwartz describes values as “*desirable trans-situational goals, varying in importance, that serve as guiding principles in the life of a person or other social entity*” (Schwartz, 1994: p. 21) and being linked to attitudes, behaviours and well-being
- The original values theory developed by Schwartz identified ten basic human values that are distinguished by people across cultures
- The refined values theory (Schwartz et al. 2012) differentiates between 19 more finely-tuned distinct values enabling more precise explanation and prediction

The Circular Structure of Compatible and Conflicting Values (Schwartz et al. 2012)



The European Social Survey (ESS)

Measuring human values in the European Social Survey

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- A 21-item Human Values Scale was included for the ESS between Rounds 1 and 11
- But some challenges with this, especially in the context of ESS's move to self-completion data collection:
 - Statements were quite long – typically including two sentences
 - There were separate versions for male and female respondents – would result in additional length in paper questionnaire and exclusive to non-binary groups
- At the same time, Schwartz argued for a switch to a revised values scale that he and his colleagues had developed

“It provides more reliability for the values and predictively powerful indexes, is more user friendly than the ESS version, and takes less time and space. Each item consists of only one sentence, eliminating what little double-barreledness there is in the ESS version”
- Following consultation and piloting, decided to adopt the new scale for the ESS using single gender-neutral versions

Change to scale - examples

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Value	Old scale	New scale
	Now I will briefly describe some people. Please listen to each description and tell me how much each person is or is not like you.	The following statements describe some people. Please indicate how much each person is or is not like you now.
	[Very much like me... Not like me at all]	[Very much like me... Not like me at all]
Hedonism	[She/He] seeks every chance [she/he] can to have fun. It is important to [her/him] to do things that give [her/him] pleasure	It is important to this person to enjoy life's pleasures
Humility	It is important to [her/him] to be humble and modest. [She/He] tries not to draw too much attention to [herself/himself]	It is important to this person to be humble

ESS translation process for new scale

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- Preliminary testing during ESS Round 12 questionnaire development process
 - Translatability checks in Advance Translations into German, Italian, Lithuanian, Poland and Serbian
 - Translated and fielded in self-completion pilot in Ireland and Bulgaria
 - No major concerns detected
- Adjudicators and Translators meeting held for ESS Round 12 – discussed translation of the 20 items with Shalom Schwartz in attendance
- Translations externally verified as part of Round 12 translation process – considered as new items – no need to repeat Round 1-11 translations but can use for reference

Translation challenges for ESS

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Gender-neutral language

- “This person” – grammatical gender in some languages requires feminine personal pronoun but this felt not to be problematic
- Gender-neutral English plural “they” -> doesn’t exist in most other languages – still needs to be translated with gendered pronouns “he/she” in many languages
- “He/She” is still in the binary scheme – for becoming gender-inclusive, other solutions are sought by some national teams / languages – e.g. using alternative words that convey the same meaning where they can be gender-neutral

Item text

- Translate words as they appear in the English source – “ask-the-same-question approach” and do NOT implement concept descriptions in target languages – e.g. “It is important to this person to be wealthy” relates to “power resources” concept, but translations should not use the term “power”

The German Socio-Economic Panel (SOEP)

Human Values Scale in the German Socio-Economic Panel (SOEP)

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- The SOEP is a large household panel, CORE sample since 1984, Refugee sample since 2015
- The new Human Values Scale is currently in field (2025) as part of the self-completion module on social distance
- Text items are supported by pictogram-like images developed by the SOEP team in consultation with Shalom Schwartz

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Leben in Deutschland

Die folgenden Aussagen beschreiben einige Personen.
Bitte geben Sie an, wie ähnlich oder unähnlich Ihnen aktuell die jeweils beschriebene Person ist.

plh0443_pe2

Dieser Person ist es wichtig, sehr erfolgreich zu sein.



☐	Ist mir sehr ähnlich
☐	Ist mir ähnlich
☐	Ist mir etwas ähnlich
☐	Ist mir nur ein kleines bisschen ähnlich
☐	Ist mir nicht ähnlich
☐	Ist mir überhaupt nicht ähnlich

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SOEP cognitive pretest

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- Cognitive pretest carried out among refugees to test the new values scale
- The goal of the pretest was to assess (1) the suitability of the revised human values scale for individuals with refugee background & (2) the suitability of the images for the item statements
- Sample included 21 individuals aged between 18 – 66 years old (13 females, 9 people with tertiary education) conducted in July/August 2024 in German, Russian and Arabic

Without migration background	5	German
With migration background	5	German & Russian
Refugees from Ukraine	6	Russian
Refugees from other countries	5	Arabic & German

Outcomes of the cognitive pretest

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- In most cases, respondents had no difficulties understanding the items and providing a response
- 15 out of the 21 respondents relied primarily on the text for providing an answer
- Main finding: uncertainty about the time reference among Ukrainian refugees
 - Difficulty providing a response because the personality was different before the start of the war and before the displacement – concerned especially the values societal and personal security, hedonism and autonomy of actions -> uncertainty which personality (pre-war or the current one) to refer to when answering the questions
 - Relatively short time after arrival to Germany; sometimes not clear how to answer questions that refer to a country-specific context (e.g. “It is important to this person that the state is strong and can defend its citizens” – i.e. which state they should be considering)
- As the result, the word “now” was added to the introduction text of the Human Values Scale: *“Please indicate how much each person is or is not like you now”*.
- Some words (e.g. “humiliated”) were difficult to understand for respondents who preferred to do an interview in German but were not German native speakers -> images might be supportive

Conclusion and outlook

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- The revised Human Values Scale using shorter item text and gender-neutral language will replace the previous scale from ESS Round 12; new scale also being adopted by SOEP
- Comparability with the previous scale with caution due to differences in content, format and wording – note to be prepared for ESS users to explain change and map old/new items
- Translation regarding gender-neutral language can be challenging – needs careful consideration of best approach
- SOEP cognitive pretest indicates a potential values change in case of major societal shocks and the aspect of time reference should be taken into consideration when surveying refugees
- The SOEP plans to adapt and pre-test the revised Human Values Scale for the youth questionnaire (11-17 years old) to enable analyses of intergenerational transmission of values as well as analyses of intrapersonal values changes over time in different population groups

THANK YOU



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