

# Appendix: Measurement Issues

This appendix has two major sections. The first section covers additional examples of life satisfaction measures typically used in large-scale national surveys. The second section discusses measurement caveats raised by QOL researchers. Doing so should further help the reader build an appreciation for the measurement complexities involving subjective well-being. Furthermore, I will describe the debate concerning the appropriate use or misuse of global reports of subjective well-being.

## 1 Examples of Life Satisfaction Measures Employed in Large-Scale National Surveys

Below I will briefly describe a variety of life satisfaction measures employed in large-scale nationally representative surveys.

### 1.1 *The Eurobarometer*

The *Eurobarometer* is a good example of a subjective indicator used to assess subjective well-being at the country level (Saris & Kasse, 1997). The *Eurobarometer* is mostly due to the work of Ronald Inglehart (Inglehart, 1977, 1990, 1997; Okulicz-Kozaryn, 2011; Reif & Inglehart, 1991). Inglehart was able to influence the content of a regular survey financed by the Commission of the European Communities in Brussels since its inception in the early 1970s. The *Eurobarometer* survey has been conducted twice a year since 1973 in all members of the European Union (EU). A large number of adults (sampled from the in the various EU countries) are surveyed. Part of the survey is the question concerning life satisfaction. The exact

question is as follows: “On the whole, are you very satisfied, fairly satisfied, not very satisfied, or not at all satisfied with the life you lead? Would you say: very satisfied, fairly satisfied, not very satisfied, or not at all satisfied.”

## ***1.2 American Changing Lives***

A large-scale survey referred to as the *Americans' Changing Lives* (US multistage stratified area probability sample) employs several items capturing life satisfaction (described in Dolan, Peasgood, & White, 2008). Examples include:

- “Now thinking about your life as a whole, how satisfied are you with it? Are you \_\_\_\_\_. The scale used for this item is a 4-point scale: Completely satisfied, Very satisfied, Somewhat satisfied, Not at all satisfied.”
- “My life could be happier than it is right now. A 4-point Likert type scale is used to capture responses: Strongly agree, Agree, Disagree, Strongly disagree.”
- “Taking all things together, how would you say things are these days? Would you say you were \_\_\_\_\_. The response scale is Very happy, Pretty happy, Not too happy.”

## ***1.3 The British Household Panel Survey***

The *British Household Panel Survey* is another major survey, began in 1991, and is a multipurpose study following a panel of respondents ( $N=5,500$  households and 10,300 individuals) from Wales, Scotland, and Northern Ireland (described in Dolan et al. 2008). The survey uses the following two items: (1) “How satisfied are you with your life? The response scale is a 7-point rating scale varying from Not satisfied at all to Completely satisfied.” (2) “Would you say that you are more satisfied with life, less satisfied, or feel about the same as you did a year ago? More satisfied, Less satisfied, About the same.”

## ***1.4 The Canadian General Social Survey***

The *Canadian General Social Survey* is a survey that was established in 1985 and involves telephone interviews from a probability sample of 10,000 (to 25,000 more recently) stratified across the ten provinces. It uses the following two items: (1) “Presently, would you describe yourself as \_\_\_\_\_. Very happy? Somewhat happy? Somewhat unhappy? Very unhappy?” (2) “I am going to ask you to rate certain areas of your life. Please rate your feelings about them (including) ‘Your life as a whole right now.’ The response scale is a 4-point satisfaction rating scale: Very satisfied, Somewhat satisfied, Somewhat dissatisfied, Very dissatisfied” (described in Dolan et al. 2008).

### ***1.5 The European Social Values Survey***

The *European Social Values Survey* is nationally representative across 20 European countries. It employs the following item: “All things considered, how satisfied are you with your life as a whole?” The response scale is 10-points ranging from “Dissatisfied” to “Satisfied” (described in Dolan et al. 2008).

### ***1.6 The German Socio-Economic Panel Survey***

The *German Socio-Economic Panel* survey focuses on households selected using multistage random sampling ( $N=24,000$ ). All members of the household are asked to participate. Data are collected through face-to-face interviews. This survey employs the following two items: (1) “How satisfied are you with your life as a whole? The response scale is a 10-point rating scale ranging from Completely dissatisfied to Completely satisfied.” (2) “How happy are you at present with your life as a whole? The response scale is also a 10-point scale ranging from Completely unhappy to Completely happy” (described in Dolan et al., 2008).

### ***1.7 The Household Income and Labour Dynamics in Australia Survey***

The *Household Income and Labour Dynamics in Australia* survey is based on a national probability interview sample. Wave 1 (2001) had 7,682 households with 13,969 successful interviews and Wave 2 with 13,401 households. The survey employs the following items: “All things considered, how satisfied are you with your life? The more satisfied you are, the higher the number you should pick. The less satisfied you are, the lower the number.” At this point, a 10-point rating scale is provided (described in Dolan et al., 2008).

### ***1.8 The Hungarian Household Panel Survey***

The *Hungarian Household Panel Survey* (1991–1997) is based on a nationwide sample of 2,600 households surveyed on an annual basis. The survey employs the following item: “Please tell me to what extent you are satisfied with each of the following parts of your life. (Including) the way your life has worked out.” The response scale is a 10-point rating scale varying from Not at all satisfied to Fully satisfied (described in Dolan et al., 2008).

## **1.9 *The International Social Survey Programme***

The *International Social Survey Programme* is an annual project involving 41 member countries. The survey includes the following item: “If you were to consider your life in general these days, how happy or unhappy would you say you are, on the whole?” The response scale involves the following categories: Very happy, Fairly happy, Not very happy, and Not at all happy (described in Dolan et al., 2008).

## **1.10 *The Latino Barometer***

The *Latino Barometer* involves 17 Spanish-speaking countries (1997–2000). 1,000 interviews were conducted per country. The survey employed the following item: “How satisfied are you with your life?” The response scale involved a 4-point scale having the following semantic categories: Not at all, Somewhat, Satisfied, and Very (described in Dolan et al., 2008).

## **1.11 *The Midlife in the US Survey***

The *Midlife in the US Survey* is based on a US national probability sample using the random-digit dialing telephone interviews focusing on 65–74 respondents. This survey employed the following item: “Please rate your life overall these days on a scale from 0 to 10 where 0 is the worst possible life overall and 10 is the best possible life overall” (described in Dolan et al., 2008).

## **1.12 *The National Child Development Survey***

The *National Child Development Survey* is based on a cohort of people born in Britain, from March 3, 1958, to September 3, 1958. Most recent data were collected in 2000 when respondents were 42 years old. The original sample was 17,414, and the follow-up sample in 2000 was 11,419. The survey employed the following items: (1) “How satisfied are you with your life so far?” (2) “How satisfied were you with your life 5 years ago?” (3) “How satisfied do you expect to be with your life in 5 years from now?” An 11-point scale was provided to capture responses: from 0=Completely dissatisfied to 10=Completely satisfied (described in Dolan et al., 2008).

### ***1.13 The National Survey of Families and Households in the USA***

The *National Survey of Families and Household* in the USA is based on a representative sample living in English-/Spanish-speaking homes. First wave was between 1987 and 1988, while the second wave was between 1992 and 1994. The size of the panel was 10,000. The following item was used: “Taking things all together, how would you say things are these days?” The response scale was a 7-point rating scale varying from 1 (Very unhappy) to 7 (Very happy) (described in Dolan et al., 2008).

### ***1.14 The Social Capital Community Benchmark Survey in the USA***

The *Social Capital Community Benchmark* in the USA is a survey based on a national sample of 26,200 respondents, representative of 40 communities nationwide. The following item was employed: “All things considered, would you say you are \_\_\_\_\_.” At this point, a 4-point rating scale was provided with the following semantic categories: “Very happy, Happy, Not very happy, Not happy at all” (described in Dolan et al., 2008).

### ***1.15 The Russian Longitudinal Monitoring Survey***

The *Russian Longitudinal Monitoring Survey* is based on a probability sample of households in 20 regions in Russia (1995–1998). Wave 1 contained 6,334 households and 17,154 individuals. The survey employed the following item: “To what extent are you satisfied with your life in general at the present time? A 5-point rating scale was provided to the respondents with the following semantic categories: Fully satisfied, Rather satisfied, Both yes and no, Less than satisfied, and Not at all satisfied” (described in Dolan et al., 2008).

### ***1.16 The Swedish Level of Living Survey***

The *Swedish Level of Living Survey* was conducted several times between 1968 and 1991. The 1991 wave involved 6,773 respondents. The survey employed the following item: “We have now been through a lot of questions about your living conditions in different areas. How do you yourself view your own conditions? By and large, do you think that your situation is \_\_\_\_\_? Very good, Rather good, Neither good nor bad, Rather bad, Very Bad” (described in Dolan et al., 2008).

### ***1.17 The Swiss Household Panel Survey***

The *Swiss Household Panel Survey* was conducted in waves between 1999 and 2004 involving a sample of 4,000 households and 7,000 respondents per year. The survey included the following item: “In general How satisfied are you with your life?” The response scale involved a 10-point rating with anchors of “Not at all satisfied” to “Completely satisfied” (described in Dolan et al., 2008).

### ***1.18 The US General Social Survey***

The *US General Social Survey* is based on a sample of 30,000 respondents interviewed between 1972 and 1994. The following item was used: “Taken all together how would you say things are these days? Would you say you are \_\_\_\_\_?” The response scale involved three possible response options: “Very happy,” “Pretty happy,” and “Not too happy” (described in Dolan et al., 2008).

### ***1.19 The World Values Survey***

The *World Values Survey* involves a nationally representative UK sample of approximately 1,000 respondents. Data were collected between 1998 and 1999. The following item was used: “All things considered, how satisfied are you with your life as a whole these days?” The response scale involved a 10-point rating scale with anchors “Dissatisfied” and “Satisfied” (described in Dolan et al., 2008).

### ***1.20 The Chinese General Social Survey***

The *Chinese General Social Survey* is a large-scale survey using a sample representative of the majority of provinces, districts, and communities in China. The life satisfaction question in the survey is phrased as follows: “Overall, how do you feel about your life?” Possible answers are: “(1) very unhappy, (2) unhappy, (3) generally happy, (4) happy, and (5) very happy” (Wang & VanderWeele, 2011).

## **2 Measurement Caveats**

Many of the measures described in Chap. 1 are based on several assumptions. The first assumption is that people have the ability to add their day-to-day affective experiences into a composite reflective of global feelings about life or a particular

**Table A.1** Measurement caveats

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Memory biases
Biases related to situational influences
Biases related to interview or questionnaire format
Biases related to standard of comparison
Biases related to scaling effects
Biases related to mood
Temporal stability problems
Biases related to social desirability

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domain of life. A second assumption is that these global feelings are relatively stable over time. Yet another assumption is that people can describe these feelings accurately and honestly (Campbell, 1981, p. 23). These assumptions have been challenged by a number of quality-of-life researchers. Below are selected examples of criticisms. For comprehensive review of methodological issues of subjective well-being measures, see Andrews and Robinson (1992), Diener, Suh, Lucas, and Smith (1999), Larsen, Diener, and Emmons (1985), and Schwarz and Strack (1999). Highlights of these caveats are summarized in Table A.1.

## 2.1 *Memory Biases*

Schwarz, Strack, and colleagues (e.g., Schwarz & Strack, 1991; Strack, Martin, & Schwarz, 1988; Strack, Schwarz, & Gschneidinger, 1985) have demonstrated that responses to global measures of subjective well-being are strongly influenced by information accessibility from memory, which in turn is strongly influenced by frequency and recency of the information. In other words, affective experiences in certain life domains that have occurred recently and with greater frequency are more likely to be retrieved from memory and used in responding to the well-being question than less-recent and less-frequent affective experiences in other life domains. Kahneman (1999) also has strongly criticized measures of global happiness, life satisfaction, and subjective well-being. He argued that these global measures are subject to many confounds. One such confound is retrospective evaluations of life tend to be biased because they mostly reflect peak and recent affective experiences. Alternatively, Kahneman suggested that satisfaction should be measured using a dense record of experience at each “point-instant utility” (i.e., during or right after the experience of an affective episode). Thus, “objective happiness” can be derived by an average of utility over a period of time.

Parducci (1995) also argued that happiness can be determined by a theoretical summation over separate momentary pleasures and pains as coded in memory. The period may be a moment, a day, or a longer period in one’s life. Therefore, domain satisfaction of any period is a conceptual summation of these separate hedonic values, positive and negative, divided by the duration of that period.

Also Csikszentmihalyi (1997) has long advocated the use of the *experience sampling method* (ESM) to measure concepts such as happiness, flow, contentment, joy, etc. The ESM entails the use of a pager or programmable watch to signal people to fill out two pages in a booklet they carry with them. Signals are programmed to go off at random times within 2-h intervals throughout the day. The subject responds by writing down the activity he or she is engaging in, the situation, and his or her feelings at that time (e.g., how happy, degree of concentration, level of motivation, level of self-esteem, and so on).

## 2.2 *Biases Related to Situational Influences*

Ross, Eyman, and Kishchuck (1986) studied how subjects arrived at a judgment of subjective well-being. They found that 41–53 % of the reasons subjects used to explain their judgments of subjective well-being reflect references to one's momentary affective state, followed by future expectations (22–40 %), past events (5–20 %), and social comparisons (5–13 %). Schwarz, Strack, Kommer, and Wagner (1987, Exp. 2) found support for the hypothesis that a situational cue may affect the respondent's mood, which in turn may influence that person's report of global well-being. By the same token, the same situational cue may serve as a standard of comparison to judge the person's condition in a specific domain, thus affecting his report of satisfaction in that domain. For example, subjects were tested in two conditions: (a) a small, dirty laboratory that was overheated, noisy, with flickering lights, and a foul odor and (b) a friendly office. Subjects reported lower levels of subjective well-being in the unpleasant environment than the pleasant one. However, when asked to report how satisfied they were with their housing conditions, subjects in the unpleasant environment reported higher levels of housing satisfaction than those in the pleasant environment. The authors explained that the same stimulus acted as a standard of reference for the subjects in judging their housing conditions. Thus, the same stimulus influencing global well-being reports may serve to influence reports of domain satisfaction in the opposite direction.

## 2.3 *Biases Related to Interview or Questionnaire Format*

Schuman and Presser (1981) have shown that the measures are quite sensitive to influences from preceding questions in a questionnaire or in an interview (cf. Smith, 1979). For example, Strack, Martin, and Schwarz (1987, 1988) have demonstrated that highly accessible information is not likely to be used in responding to well-being questions if the information is perceived by the respondent to have been already provided in an earlier part of the questionnaire (or interview). For example, if the interviewer asks a subject "How is your wife?" in one part of the interview, then follows up this question by "How is your family?" in another part of the interview, the subject is not likely to provide information about the wife's well-being



by responding to the latter question. This is because the subject may feel that he already provided that information by responding to the former question (Schwarz & Strack, 1991).

Schimmack and Oishi (2005) conducted a meta-analysis of studies that manipulated the order of life satisfaction and domain satisfaction measures. They were able to demonstrate that the order effect is, on average, quite small.

## ***2.4 Biases Related to Standard of Comparison***

Strack et al., (1985) were able to demonstrate that events recalled from the past may lead to different social judgments of subjective well-being. Specifically, a subject, thinking about a negative past event, may report higher levels of subjective well-being than a person thinking about a positive event may. This is because the subject uses the negative past event as a standard of reference to compare his present situation. Using a negative standard of reference enhances the likelihood that the person will judge his present circumstance to be better than the past, thus generating feelings of well-being. This finding can be further illustrated by results showing that senior US citizens who lived through the depression years (past negative event) report higher levels of subjective well-being than those who did not live through the depression years (Elder, 1974). The reverse may be true. In other words, those who are asked to think of a positive past event report lower levels of subjective well-being (than those who think of a negative past event). This is because the standard of reference is high and the chances are not good that the present circumstance is better than the past, thus generating lower levels of subjective well-being (Schwarz & Strack, 1991).

## ***2.5 Biases Related to Scaling Effects***

Schwarz and colleagues (e.g., Schwarz, 1988; Schwarz & Hippler, 1987; Schwarz & Strack, 1991) have shown that respondents assume that the midpoint of the scale of a subjective well-being measure reflects “an average,” i.e., the level where most people are. Thus, they compare themselves against the average to indicate their own level of subjective well-being—relative to the average. The problem, of course, is that the midpoint is not necessarily the average.

## ***2.6 Biases Related to Mood***

In answering questions related to subjective well-being, respondents are influenced by their mood at the time of their response. A positive mood biases responses toward reporting higher levels of subjective well-being, and vice versa. Much evidence has

been amassed by Schwarz, Strack, and colleagues demonstrating the effect of mood on responses to subjective well-being questions (e.g., Munkel, Strack, & Schwarz, 1987; Schwarz, 1983; Schwarz & Clore, 1983; Schwarz et al., 1987). Based on a more recent review of the literature, Diener (2009) concluded that “Taken together, the data ... suggest that both current mood and long-term affect are reflected in SWB measures” (p. 22).

## 2.7 *Temporal Stability Problems*

Measures of subjective well-being have been shown to have low test-retest reliability, between .40 and .60 within an hour interval. That is, the same question is asked in different places in the same questionnaire or within a 1-h interview (Glatzer, 1984). In contrast, Diener (1984) reported more satisfactory reliability results. Specifically, he reported that most studies with long-term reliabilities show values ranging from .55 to .70.

Revisiting this topic and assessing the most recent evidence, Diener (2009) concludes as follows:

Thus, the reliabilities point to some portion of happiness due to personality, but also accentuate the importance of life circumstances. The best measure in terms of time covered and stability will depend on the particular theoretical questions that the investigator wishes to study (p. 23).

Schimmack and Oishi (2005) conducted a meta-analysis examining the stability of life satisfaction measures. The study revealed that stability decreased with increasing intervals. For instance, the predicted 2-, 5-, and 10-year stabilities were approximately 0.60, 0.50, and 0.35, respectively.

Fujita and Diener (2005) and Lucas and Donnellan (2007) used data from large-scale panel studies to examine the stability of a single-item life satisfaction measure. The findings demonstrated stability of approximately 0.25—more specifically, stability coefficients asymptote around 0.35.

More recently, Michalos and Kahlke (2010a, 2010b) conducted a major study to test the stability and sensitivity of perceived quality-of-life measures (measures of happiness, satisfaction with life as a whole, perceived quality of one’s own life, satisfaction with life domains, positive and negative affect, measures of life satisfaction based on perceived gaps between what one has in relation to a several standards such as what one wants, what the neighbor has, and so on). It was hypothesized that perceived quality-of-life measures are sensitive to changes in one’s life. The study involved a survey of 462 residents of British Columbia at 3 points in time (2005, 2006, and 2007). The results demonstrated that changes in the perceived quality-of-life measures were corresponded to self-reported changes in one’s life circumstances. These results provide support to the notion that the perceived quality-of-life measures are sensitive to variations in one’s life circumstances as well as the temporal stability (i.e., reliability) of the measures.

## 2.8 *Biases Related to Social Desirability*

Much evidence suggests that higher subjective well-being ratings are reported in a face-to-face interview than through a mail questionnaire (Smith, 1979). The effect reflects social desirability confounds prevalent in social science research (Schwarz & Strack, 1991). That is, subjects interviewed face-to-face tend to report inflated satisfaction ratings—inflated relative to their “true” feelings. They do this because they do not want to look “bad” in the “eyes” of the interviewer. The severity of this problem is significantly diminished using mail questionnaires in which respondents complete the questionnaires privately.

Diener (2009) argues that social desirability confounds in subjective well-being measures is not a significant problem. He makes reference to studies showing low correlations with lie and social desirability scales (about .20). In addition, the subjective well-being measures tend to correlate highly with unobtrusive measures (e.g., smiling and laughing) and non-self-report measures (e.g., informant-based measures).

## 3 In Defense of Self-Reports and Global Measures of Life Satisfaction

Veenhoven (1991) has argued that such criticisms are not wholly justified. Self-reports of happiness tend to be prompt, nonresponse is low, and temporal stability is high. Furthermore, there is little evidence to indicate that self-reports of happiness are confounded by stereotypical responses (evidence reviewed in Veenhoven, 1984, pp. 40–42). The criticism of overstatement (that people overstate their state of happiness) is also unjustified (evidence reviewed in Veenhoven, 1984, pp. 44–51). Andrews and Withey (1976, p. 216) estimated that error accounts for half the variance in life satisfaction (cf. Kammann, 1982). Veenhoven (1991) explains the causes for the error. He asserted:

Several reasons for this vulnerability seem to be involved. Firstly, some people may not have a definite opinion in mind and engage in an instant (re)assessment which is then influenced by situational characteristics.... Secondly, those who do have a definite opinion will mostly hold a rather global idea of how happy they are and will not think in terms of a 10-point scale. Hence, their precise score may vary. Thirdly, the process of retrieval involves some uncertainty as well (p. 12).

Kammann (1983) and Kammann, Christie, Irwin, and Dixon (1979) presented evidence that counters the criticism that subjective well-being measures are influenced by the questions immediately preceding their administration. Diener (1984), based on a literature review, has asserted that none of the measures reviewed shows high social desirability effects. Most of the measures correlate as expected with personality measures and show high convergent validity. Furthermore, the

measures correlate as expected with non-self-report data involving demographic variables. Diener concluded:

Thus, the SWB measures seem to contain substantial amounts of valid variance. However, this does not imply that some distortions do not occur. The topic of distortion, bias, and encoding of SWB is a valuable direction for future research. Thus, although there is certainly sufficient validity in the measures to build theories of SWB, one part of these theories should be how these subjective reports are formed (including various forms of distortion). Theories of encoding one's affect should be integrated with the bottom-up versus top-down approaches to happiness... (p. 551).

Diener and Suh (1999) have defended the use of subjective well-being surveys in measuring concepts such as life satisfaction, hedonic balance, and positive and negative affect by arguing that most of these measures show a good deal of convergent validity. For example, global subjective well-being measures based on self-reports were found to covary with ratings made by family and friends, with interviewer ratings, with amount of smiling in an interview, and with the number of positive versus negative memories people recall. The validity of the global subjective well-being measures based on self-report has also been demonstrated by significant correlations with other measures, as predicted by theory and past research. For example, the subjective well-being measures were found to correlate with measures of self-esteem, optimism, self-efficacy, and depression, as predicted by theory and past research. Furthermore, there is good evidence of temporal reliability of the global subjective well-being measures based on self-reports. Finally, the authors made a strong case for the fact that the global subjective well-being measures (based on self-reports) are not significantly influenced by methodological artifacts such as subject's mood, habitual use of numbers in responding to scales, propensity to be humble, and tendency to avoid extremes on the scale. Thus, they concluded as follows:

Our broad conclusion about the assessment of SWB is that although the SWB measures have a degree of validity and are often not as contaminated as popular lore might suggest, they can be influenced by measurement artefacts and momentary situational factors. Thus, strong conclusions can be gained only when measurement artefacts are assessed and controlled, and when several types of measurement methods are employed and lead to the same conclusion (p. 438).

More recently, Lucas and Diener (2009) made the following assessment:

In summary, evidence to date suggests that self-report measures of SWB [subjective well-being] are reliable and valid, sensitive to external circumstances, and responsive to change. They correlate with additional self-report measures and criteria. Finally, they prospectively predict theoretically relevant behaviours and outcomes, which show that they can be useful both in research and in practice. It is true that there may be times when contextual factors influence these judgments, but we are aware of no research that suggests that such contextual effects have a large impact on the validity of the measures. Thus, researchers can be confident that SWB [subjective well-being] can be assessed well with standard self-report measures. That being said, we also believe that self-report does not provide a gold standard, and thus alternative techniques ... or other self-report procedures that do not require memory for, and aggregation across, numerous events can help. In addition, non-self-report measures, including informant reports, psychophysiological measures, textual analysis, and other novel techniques, can provide important information about the extent to which a person's life is going well (p. 83).

To cap it off, Diener (2009) stated the following:

One can be encouraged by the state of measurement of subjective well-being. Most measures correlate moderately with each other and have adequate temporal reliability and internal consistency. In addition, well-being scales show interesting theoretical relationships with other variables. The global concept of happiness ... is being replaced by researchers with more specific and well-defined concepts, and measuring instruments are being developed concurrently with the theoretical advances (p. 24).

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