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## A Repository of Schwartz Value Scales with Instructions and an Introduction

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## A Repository of Schwartz Value Scales with Instructions and an Introduction

### Abstract

This repository of value instruments includes the numerous authorized language versions of each of the four instruments developed by Schwartz to measure the basic values in his theory: The Schwartz Value Survey (SVS), the Portrait Values Questionnaire (PVQ40), the PVQ21 (aka the Human Values Scale of the European Social Survey [ESS21]), and the revised PVQ-RR. For each instrument, the repository includes instructions for coding and analysis and the most important references relevant to it. A short introductory essay briefly outlines the key assumptions underlying the theory and instruments, the principles that organize the values into a circle, and the translation protocol. The essay includes a table that compares the four instruments on 12 characteristics relevant for choosing the one most appropriate for use in a particular study.

Click on 'download' to see the introductory essay.

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## A Repository of Schwartz Value Instruments

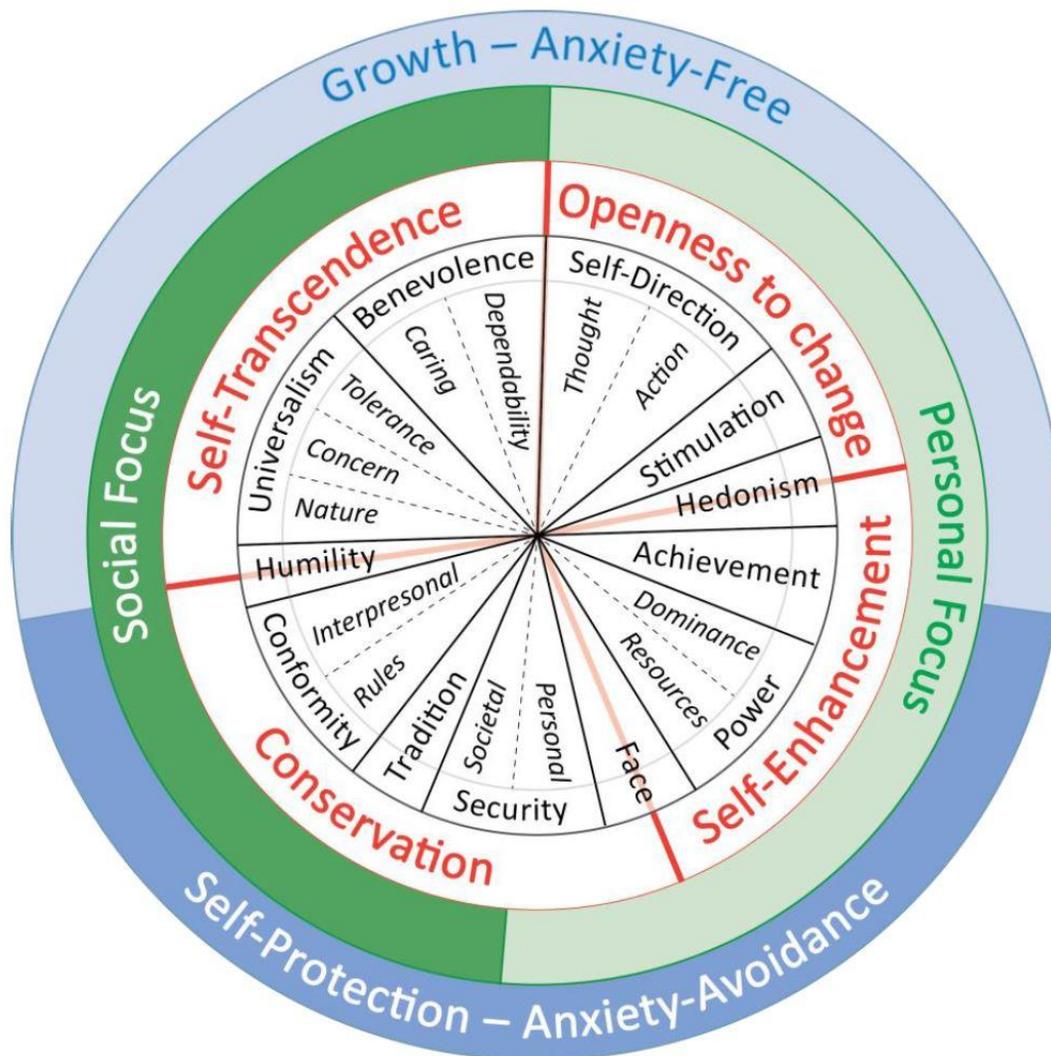
This essay introduces the four instruments I have developed to measure the basic values in my theory: The Schwartz Value Survey (SVS), the Portrait Values Questionnaire (PVQ40), the PVQ21 (aka the Human Values Scale of the European Social Survey [ESS21]), and the revised PVQ-RR. The repository of value instruments accompanying this essay contains numerous language versions of each of these instruments.

For in depth presentations of the basic theory of values and of literature based on it, I recommend the following publications: Schwartz (1992), Schwartz et al. (2012), Schwartz (2016), and Sagiv and Schwartz (2022). The most important references for each instrument are listed in the instructions for coding and analyses for that instrument in the repository. This essay provides an overview of the assumptions on which the theory is based, a listing of the different values measured by the instruments, and a comparison of the instruments on a variety of criteria.

The theory of basic values proposes three key assumptions:

- (1) Values are cognitive representations of the motives (that is, goals) necessary to cope with three universal requirements for human survival: (a) biological needs of the organism, (b) interactive needs for interpersonal coordination, and (c) group needs for welfare and survival. Each of the specific values is derived from one or more of these three requirements. Because these requirements are universal, the values derived from them are likely to be recognized across cultures.
- (2) Values form a coherent structure based on the degree of compatibility or conflict between the goals the values express. This implies that values form a circular structure in which the more compatible any two values are, the closer they are going around the circle, and the more in conflict, the more distant. Compatible values guide similar perceptions, preferences, and behaviors, so one can pursue their goals successfully in the same action. Conflicting values guide opposing perceptions, preferences, and behaviors, so pursuing one precludes or inhibits pursuing the other. Table 1 presents the values and the goals they express. Figure 1 presents their circular structure.
- (3) The circle of values is a continuum in which values blend into one another rather than forming discrete entities. This implies that one can partition the value circle arbitrarily into as many or as few value categories as is useful. The original theory partitioned the continuum into the ten values shown in the center of Figure 1. It grouped these values into two pairs of higher order values to form two dimensions. The openness to change vs. conservation dimension captures the conflict between independent thought, action, and feelings, challenge and change (self-direction, stimulation, and hedonism values) and self-restriction, preserving the past, order, and resistance to change (conformity, tradition, and security values). The self-enhancement versus self-transcendence dimension captures the conflict between concern for the welfare and interests of others (universalism and benevolence values) and concern for one's own interests, relative success, and dominance over others (power and achievement values).

Figure 1. Circular Motivational Continuum of the Values in the Schwartz Value Theory (from Sagiv & Schwartz, 2022).



*Table 1.* The Four Higher Order Values, 10 Basic Values, and 19 More Narrowly Defined Values in the Refined Theory of Values (adapted from Schwartz & Cieciuch, 2021).

Four higher order values	10 original values	19 more narrowly defined values
<b>Self-transcendence</b>	<b>Benevolence</b> - Preservation and enhancement of the welfare of people with whom one is in frequent personal contact	<b>Benevolence-Dependability</b> - Being a reliable and trustworthy member of the in-group <b>Benevolence-Caring</b> - Devotion to the welfare of in-group members
	<b>Universalism</b> - Understanding, appreciation, tolerance, and protection for the welfare of <i>all</i> people and of nature	<b>Universalism-Tolerance</b> - Acceptance and understanding of those who are different from oneself <b>Universalism-Concern</b> - Commitment to equality, justice, and protection for all people <b>Universalism-Nature</b> - Preservation of the natural environment
<b>Conservation</b>	<b>Conformity</b> - The restraint of actions, inclinations, and impulses that are likely to upset or harm others and violate social expectations or norms	<b>Humility</b> <sup>a</sup> - Recognizing one's insignificance in the larger scheme of things <b>Conformity-Interpersonal</b> - Avoidance of upsetting or harming other people <b>Conformity-Rules</b> - Compliance with rules, laws, and formal obligations)
	<b>Tradition</b> - Respect, commitment, and acceptance of the customs and ideas that traditional culture or religion provides	<b>Tradition</b> - Maintaining and preserving cultural, family, or religious traditions
	<b>Security</b> - Safety, harmony, and stability of society, relationships, and self	<b>Security-Societal</b> - Safety and stability in the wider society <b>Security-Personal</b> - Safety in one's immediate environment <b>Face</b> <sup>a</sup> - Security and power through maintaining one's public image and avoiding humiliation
<b>Self-enhancement</b>	<b>Power</b> - Control or dominance over people and resources	<b>Power-Resources</b> - Power through control of material and social resources <b>Power-Dominance</b> - Power through exercising control over people
	<b>Achievement</b> - Personal success through demonstrating competence according to social standards	<b>Achievement</b> - Definition unchanged
<b>Openness to change</b>	<b>Hedonism</b> - Pleasure and sensuous gratification for oneself	<b>Hedonism</b> <sup>a</sup> - Definition unchanged
	<b>Stimulation</b> - Excitement, novelty, and challenge in life <b>Self-Direction</b> - Independent thought and action, choosing, creating, and exploring	<b>Stimulation</b> - Definition unchanged <b>Self-Direction-Action</b> - The freedom to determine one's own actions <b>Self-Direction-Thought</b> - The freedom to cultivate one's own ideas and abilities

*Note.* <sup>a</sup> Humility is located between the higher-order conservation and self-transcendence values. Hedonism is located between the higher-order openness to change and self-enhancement values. Face is located between the higher-order self-enhancement and conservation values.

Subsequent research revealed that people reliably discriminate some 19 values in the value circle. The refined value theory therefore partitions the circle into 19 values. The 19 values can be used when more fine-tuned analyses are desired. Table 1 presents 19 values and the goals they express and shows their relations to the 10 values and 4 higher order values.

Two principles structure the order of the values around the circle in addition to their conflict and compatibility. (a) Values that focus on personal outcomes (e.g., stimulation; see Figure 1) contrast with values that focus on social outcomes (e.g., tradition). (b) Values that express self-expansive, growth motivations (e.g., self-direction) contrast with values that express self-protective motivations (e.g., security).

The circular structure of values has a key consequence: The whole circle of values relates to other variables (behaviors, attitudes, personality traits, or demographics) in a systematic manner. Relations of values with another variable (e.g., religiosity) usually decrease monotonically in both directions around the circle from the most positively related value (tradition) to the least positively or most negatively related value (hedonism). Deviations from this pattern suggest that from multiple, different types of motivation influence the behavior or attitude.

The past 30 years have seen the development of some 13 instruments to measure the 10 or 19 basic values of the Schwartz theory among children, adolescents and adults.<sup>1</sup> Here, I discuss three characteristics of the four instruments I developed whose language version are available in the repository.

**Translation.** The same translation-backtranslation procedure was applied for translating the SVS, PVQ40, and PVQ-RR. Those interested in preparing a translation received an original English version of the instrument, annotated to clarify nuances, from me. If a cognate version was already available, that too was provided. A native speaker prepared a translation, a bilingual who had not seen the English version, prepared a back-translation, and these were returned to me. I checked the translation and back-translation, often with the aid of another bilingual, commented on any possible problems, and returned the commented back-translation. Typically, this process of translation, backtranslation, and comments required three iterations, sometimes more, to authorize a language version. The appendix of this article includes the protocol used for translations. The ESS website ([https://www.europeansocialsurvey.org/docs/round5/methods/ESS5\\_translation\\_guidelines.pdf](https://www.europeansocialsurvey.org/docs/round5/methods/ESS5_translation_guidelines.pdf)) details the procedure used to translate the PVQ21.

**Context.** In keeping with the conception of *basic* values as trans-situational, the four instruments avoid specifying a context. Researchers may be interested, however, in how people's values apply in specific contexts (e.g., at work) or relationships (e.g., with one's family). People's situational value priorities may vary around their trans-situational priorities. By modifying the instructions for these instruments, it is possible to measure values in specific contexts.<sup>2</sup>

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<sup>1</sup> For a table listing and comparing the methodological characteristics of these instruments, see Roccas, Sagiv and Navon (2017: pp. 42-44).

<sup>2</sup> See Daniel et al. (2012) for examples of how to do this.

**Rating vs. Ranking.** The SVS uses a combination of rating and ranking for responses. Respondents first to choose their most and least important values from a list and then to use those as anchors when rating the remaining values. The PVQ instruments use only rating. Ranking provides the relative importance of each value; rating provides their absolute importance. With both the SVS and the PVQ, researchers can derive value priorities from the ratings. This is usually desirable because values relate to other variables based on tradeoffs between the values that promote vs. inhibit the other variables, that is, their relative priority.

Table 2 compares the four instruments on criteria relevant to choosing the one most appropriate for particular studies. I explicate some of these criteria whose meaning is not self-evident.

Table 2. A Comparison of the Characteristics of Four Value Instruments.

Characteristic	SVS	PVQ21 (ESS21)	PVQ40	PVQ-RR
# of distinct values measured	4 higher order 10 basic	4 higher order 10 basic	4 higher order 10 basic	4 higher order 10 basic 19 refined
Time range for completion by 90% of respondents	10 - 20 minutes	2 - 5 minutes	4 – 8 minutes	4 – 8 minutes
# of items	57	21	40	57
Sentences per item	1 (phrase)	2	2	1
Type of items	Abstract terms	Vignettes	Vignettes	Vignettes
Item phrasing	VALUE TERM (specifying term)	Importance sentence + goal, wish, or aspiration sentence	Importance sentence + goal, wish, or aspiration sentence	Importance sentence only
Response scale	-1 opposed to my values 0 not at all important 7 of supreme importance	0 not like me at all 4 moderately like me 6 very much like me	0 not like me at all 4 moderately like me 6 very much like me	0 not like me at all 4 moderately like me 6 very much like me
Average alpha reliability of the values (range)	10 values: .61 (.54 - .71)	10 values: .57 (.41 - .70)	10 values: .64 (.47 - .75)	10 values: .77 (.62 - .84) 19 values: .72 (.48 - .84)
Discrimination of values:				
% samples: 10 distinct	30%	79%	44%	80%
at least 8 distinct + pair	76%	96%	88%	92%
# of language versions	43	35	36	45
Online use?	problematic	yes	yes	yes
Suitable for ages	16+	13+	13+	13+

**Sentences per item.** The SVS lists an abstract value followed in parentheses by a synonym(s) or explanatory phrase). The PVQ21 and PVQ40 present one or two sentences describing a person for whom a value is important. The PVQ-RR avoids possible double-barreled items by presenting only one sentence, which also reduces response time.

**Abstractness vs. Concreteness.** Abstract instruments (e.g., the SVS) ask respondents to rate the importance of abstract items (e.g., 'equality' for universalism, 'wealth' for power). This approach assumes that individuals have consciously articulated, abstract values to which they have direct access, so they can report them accurately. More concrete and indirect approaches (e.g., the various PVQ instruments) present vignettes that describe people who hold particular values. Respondents indicate how similar each of the described people is to them. Examples are "It is important to her to have a good time" for hedonism values and "It is important to her never to annoy anyone" for conformity values. This approach assumes that, even without abstract conceptions of their own values, individuals can recognize their own values when making social comparisons.

**Response Scale.** Every point on the response scales for the PVQ instruments is labeled. For the SVS, points 1, 2, 4, and 5 are not labeled. The response scales are asymmetrical. There are more points on the side of the scale indicating greater importance (SVS) and greater similarity to self (PVQ). This reflects the fact, established in pretesting that compared various scale configurations, that respondents utilize the 'positive' side of the scale more frequently. Therefore, the scales permit greater discrimination on the 'positive' side.

**Discrimination of Values.** The instruments differ in their adequacy for discriminating the values in the theory. The data for discrimination of values come from examination of the multidimensional scaling analyses of item responses in each sample. Only samples with at least 150 respondents were included. For each instrument, Table 2 reports the percent of samples studied that discriminated all of the 10(19) values. It also lists the percent of samples that discriminated at least 8(17) values plus a mixed pair of values that are adjacent in the theoretical circle. The numbers of samples examined were: SVS (49), PVQ21 (71), PVQ40 (97), PVQ-RR (90).

When comparing instruments on this criterion, it is important to keep two things in mind. The size and socio-economic level of the samples affect discrimination of values. Discrimination is usually better in samples with over 500 respondents and in samples from more socio-economically developed nations. All of the ESS samples exceeded 1000 respondents and came from relatively developed countries. For the other three instruments, the large majority of the samples included 150-300 respondents and came from both developing and developed nations around the world.

**Appropriateness for Online use.** All are easily administered online except the SVS. The SVS is problematic because it requires respondents to read through lists of value items before responding to the single items.

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## APPENDIX

### Translation guideline for the Schwartz value instruments

The procedure requires that at least 3 highly competent bilinguals. The steps are as follows:

1. Translate the instrument to xx [language] including the instructions and scale labels.
2. Obtain a back-translation into English by a person who has not seen the original English. Send both the translation and back-translation to me [Shalom Schwartz]
3. I send you my comments on the translation, usually on about 50% of the items.
4. Make changes in the items commented, as needed
5. Give the new full translation (including all items, instructions, scale labels) to a different bilingual to translate back into English
6. Send me the revised translation and back-translation
7. I send you my comments on the revised translation
8. Repeat 4-7 until we reach an agreed translation

An alternative to (1-2) is to obtain two independent translations and then have the two translators meet to discuss their differences, before going to the bilingual who will back-translate and send to me.