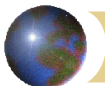


## *An overview of wellbeing concepts and their potentials and limits in cross-cultural research*

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### *Introduction: Why wellbeing research in sociology?*

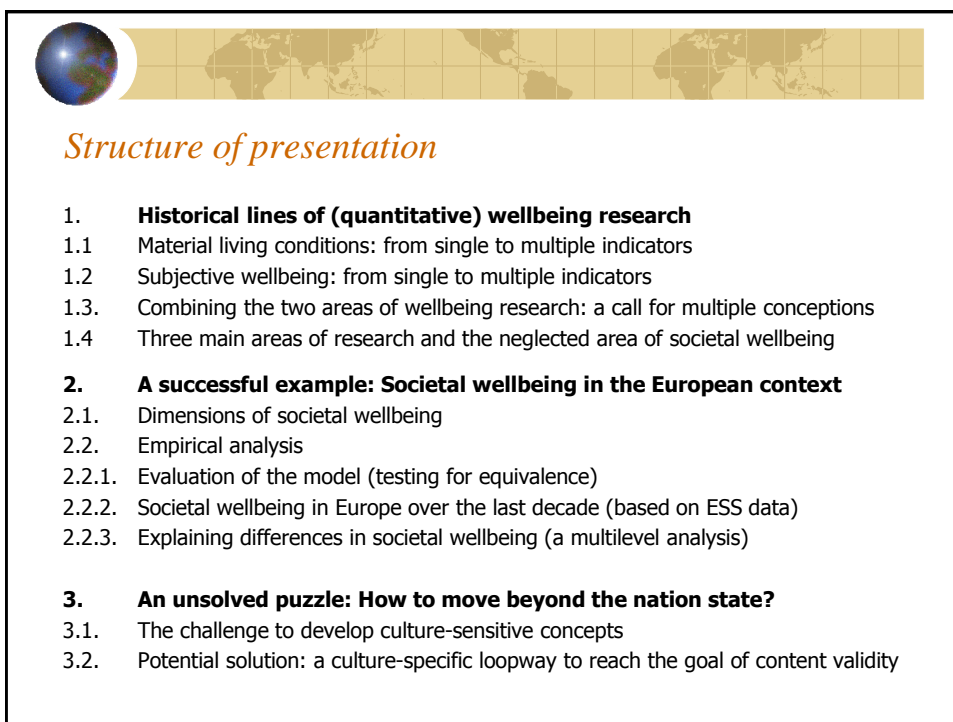
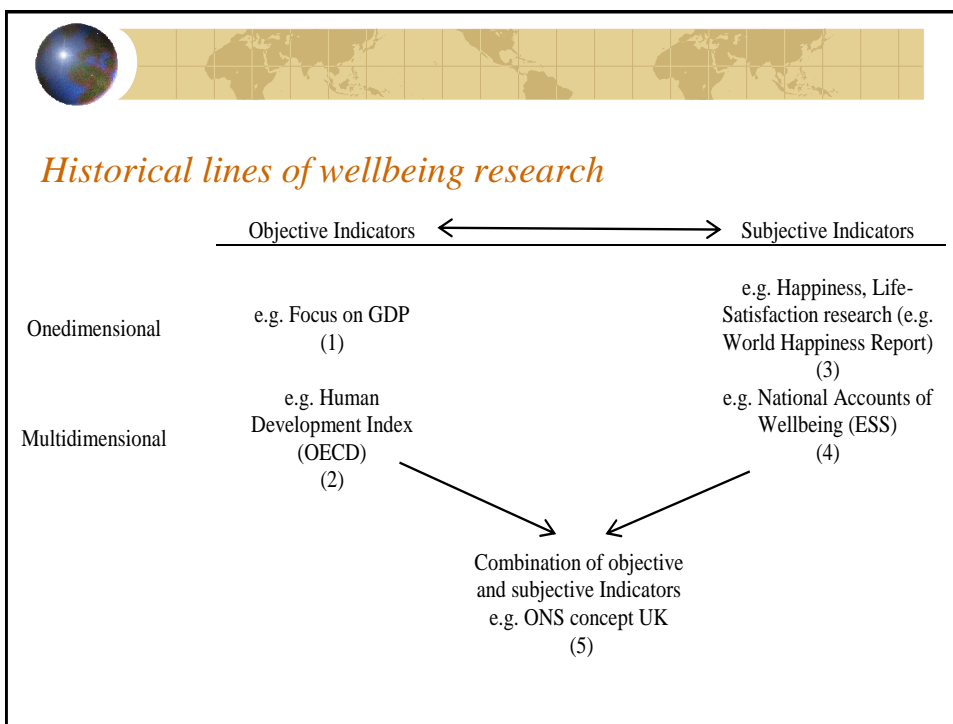
- ⊕ Wellbeing: booming research area in economics, political science, psychology, sociology
- ⊕ Especially popular since the global financial and economical crisis

#### **Two major trends in wellbeing research:**

- ⊕ Increased relevance of subjective factors
  - ⊕ Shift to multidimensional concepts
- Reflected in statements of the famous Sen-Stiglitz-Fitoussi commission (2008)

#### **How can and should sociology contribute to this research field?**

- ⊕ Let's use our established methods (critically) for generalizable conclusions
  - ⊕ Let's identify dynamics that counteract a high quality of living because it is rather impossible to define crucial elements of the good life for everybody
- Imbusch and Rucht (2005) "*Societal integration is like health: its value becomes visible when it is threatened or has already been lost.*"





## Material living conditions

1. Historical lines of (quantitative) wellbeing research?
  - 1.1 Material living conditions: from single to multiple indicators
  - 1.2 Subjective wellbeing: from single to multiple indicators
  - 1.3. Combining the two areas of wellbeing research: a call for multidimensional conceptions
  - 1.4 Three main areas of research and societal wellbeing

- ✦ GDP: long seen as most important measure of societal progress
- ✦ Rough measurement of the material standard of living
- ✦ Since the 1970s efforts to create new indicators including other dimensions
- ✦ HDI (UN, 1990): index of human development including BIP, life expectancy and education

**Two different research fields:** Level of living approach (Erikson & Veichtner, 1974) vs. SWB

- ✦ LLA focuses on individual resources (e.g. income, education, societal participation) and contextual effects (environmental quality, health system, infrastructure)
- ✦ SWB (e.g. Campbell, 1981) reflects US-tradition of social psychology

**The link between objective and subjective factors:**

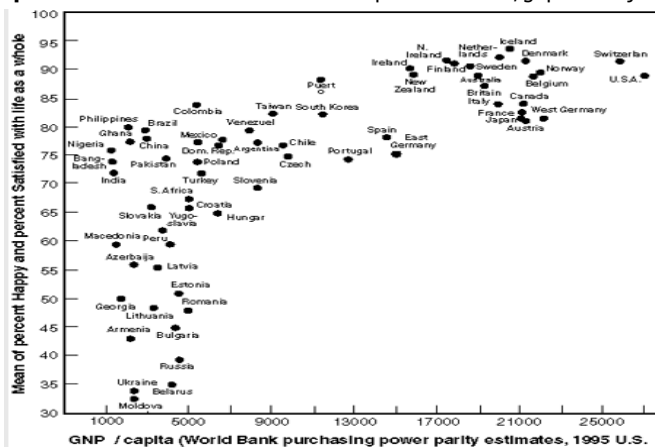
- ✦ Interestingly only low correlations (e.g. Huppert et al. 2009, p. 302)
- ✦ Happiness paradox (e.g. Central America)
- ✦ Dissatisfaction dilemma (e.g. Japan)



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**Examples:** Easterlin-Paradox: curvilinear impact of income/gdp on subjective wellbeing



Source: Inglehart & Klingemann, 2000



## Material living conditions

### Examples HDI 2015

Source: UN, 2016, 22

| HDI rank                           | Human Development Index |       | Inequality-adjusted HDI |                           | Gender Development Index |        | Gender Inequality Index |       |    |
|------------------------------------|-------------------------|-------|-------------------------|---------------------------|--------------------------|--------|-------------------------|-------|----|
|                                    | Value                   | Value | Overall loss (%)        | Difference from HDI rank* | Value                    | Group† | Value                   | Rank  |    |
|                                    | 2015                    | 2015  | 2015                    | 2015                      | 2015                     | 2015   | 2015                    | 2015  |    |
| <b>VERY HIGH HUMAN DEVELOPMENT</b> |                         |       |                         |                           |                          |        |                         |       |    |
| 1                                  | Norway                  | 0.949 | 0.898                   | 5.4                       | 0                        | 0.993  | 1                       | 0.053 | 6  |
| 2                                  | Australia               | 0.939 | 0.861                   | 8.2                       | -1                       | 0.978  | 1                       | 0.120 | 24 |
| 2                                  | Switzerland             | 0.939 | 0.859                   | 8.6                       | -4                       | 0.974  | 2                       | 0.040 | 1  |
| 4                                  | Germany                 | 0.926 | 0.859                   | 7.2                       | -1                       | 0.964  | 2                       | 0.066 | 9  |
| 5                                  | Denmark                 | 0.925 | 0.858                   | 7.2                       | -2                       | 0.970  | 2                       | 0.041 | 2  |
| 5                                  | Singapore               | 0.925 | --                      | --                        | --                       | 0.985  | 1                       | 0.068 | 11 |
| 7                                  | Netherlands             | 0.924 | 0.861                   | 6.9                       | 2                        | 0.946  | 3                       | 0.044 | 3  |
| 8                                  | Ireland                 | 0.923 | 0.850                   | 7.9                       | -2                       | 0.976  | 1                       | 0.127 | 26 |
| 9                                  | Iceland                 | 0.921 | 0.868                   | 5.8                       | 6                        | 0.965  | 2                       | 0.051 | 5  |
| 10                                 | Canada                  | 0.920 | 0.839                   | 8.9                       | -2                       | 0.983  | 1                       | 0.098 | 18 |
| 10                                 | United States           | 0.920 | 0.796                   | 13.5                      | -10                      | 0.993  | 1                       | 0.203 | 43 |
| 12                                 | Hong Kong, China (SAR)  | 0.917 | --                      | --                        | --                       | 0.964  | 2                       | --    | -- |
| 13                                 | New Zealand             | 0.915 | --                      | --                        | --                       | 0.963  | 2                       | 0.158 | 34 |
| 14                                 | Sweden                  | 0.913 | 0.851                   | 6.7                       | 3                        | 0.997  | 1                       | 0.048 | 4  |
| 15                                 | Liechtenstein           | 0.912 | --                      | --                        | --                       | --     | --                      | --    | -- |
| 16                                 | United Kingdom          | 0.909 | 0.836                   | 8.0                       | -1                       | 0.964  | 2                       | 0.131 | 28 |
| 17                                 | Japan                   | 0.903 | 0.791                   | 12.4                      | -8                       | 0.970  | 2                       | 0.116 | 21 |
| 18                                 | Korea (Republic of)     | 0.901 | 0.753                   | 16.4                      | -19                      | 0.929  | 3                       | 0.067 | 10 |
| 19                                 | Israel                  | 0.899 | 0.778                   | 13.5                      | -11                      | 0.973  | 2                       | 0.103 | 20 |
| 20                                 | Luxembourg              | 0.898 | 0.827                   | 8.0                       | 1                        | 0.966  | 2                       | 0.075 | 13 |
| 21                                 | France                  | 0.897 | 0.813                   | 9.4                       | -1                       | 0.988  | 1                       | 0.102 | 19 |
| 22                                 | Belgium                 | 0.896 | 0.821                   | 8.3                       | 2                        | 0.978  | 1                       | 0.073 | 12 |

1. Historical lines of (quantitative) wellbeing research?
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## Subjective Wellbeing - single indicators

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### Happiness research: since the 1980s

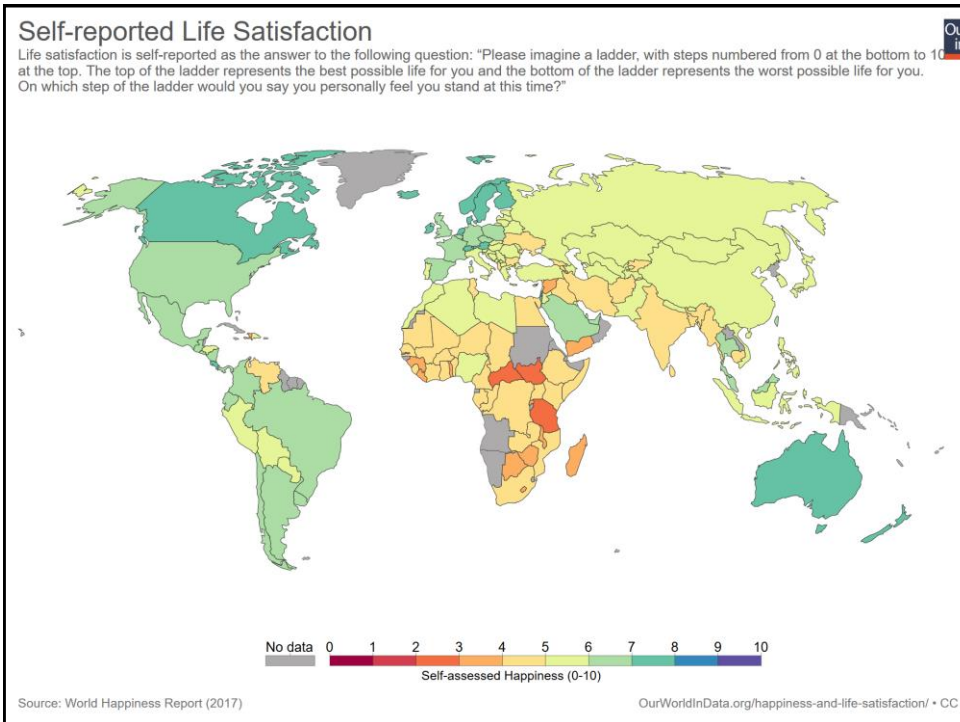
- ✦ Subjective wellbeing as highest criterion of societal progress
- ✦ affective (emotional wellbeing and thus "happiness") and cognitive component (general life satisfaction)
- ✦ Both indicators already used in WVS 1981 and usually integral part of numerous cross-national surveys

### Current form of measurement: four different variables

- ✦ cognitive evaluation of life (life satisfaction)
- ✦ Happiness (a permanent "balance" of affect)
- ✦ positive and negative emotional states (with regard to shorter or longer periods)

### Methodological strengths and weaknesses:

- ✦ Single item indicators generally considered as reliable and valid (e.g. Veenhofen, 2011)
- ✦ "Reported happiness" just a weak indication of general feelings
- ✦ Problems of social desirability and cultural response styles



## Subjective wellbeing – multiple indicators

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**Examples:** NAOW concept (NEF, 2006)

- ✦ Implemented in the 3rd and 6th wave of the ESS
- ✦ 50 indicators but no coherent factorial structure across Europe
- ✦ Personal wellbeing is distinguished in a hedonic state and eudaimonic process (cf. Kahnemann et al., 1999)
- ✦ Societal wellbeing is achieved through social support and social recognition

**Personal well-being**

- Emotional well-being
  - Positive feelings
  - Absence of negative feelings
- Satisfying life
- Vitality
  - Self-esteem
  - Optimism
  - Resilience
- Resilience and self-esteem
- Positive functioning
  - Competence
  - Autonomy
  - Engagement
  - Meaning and purpose

**Social well-being**

- Supportive relationships
- Trust and belonging

**Well-being at work**



## Multidimensional conceptions

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**Current aim:** linking social indicator and SWB-research  
(cf. Diener & Suh, 2000; Glatzer, 2008)

- ✦ Key dimensions of quality of life should be measured with objective and subjective factors (health, education, indicators on employment and housing, political participation and rights, social relations, environmental conditions and existential insecurity) (Stiglitz, Sen, Fitoussi 2009)
- ✦ This conception also reflected in "Better Life Index" (OECD, 2011) where wellbeing "requires meeting various human needs, some of which are essential (e. g. being in good health) as well as the ability to pursue one's goals, to thrive and feel satisfied with life." (OECD, 2011, p. 18)

### **Problematic aspects:**

- ✦ Mainly Western based approaches
  - ✦ Comparability of key dimensions under question (especially with regard to culturally distant countries or groups (e.g. Yamamoto, 2007)
- Leads to shift towards nation-specific concepts (because of lack of equivalence)

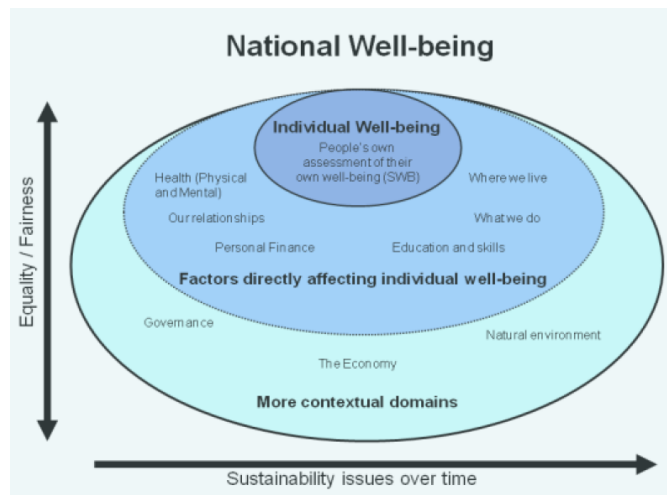


## Multidimensional conceptions

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### **Example** ONS concept

The national statistics institute of Great Britain (ONS) is currently using a nationally based measurement trying to directly implement the recommendations of the Stieglitz-Commission





## Main research areas

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### 1.4 Three main areas of research and societal wellbeing

|            | Individual           | Contextual         |
|------------|----------------------|--------------------|
| Objective  | Living Standards     | Contextual factors |
| Subjective | Subjective Wellbeing | Societal wellbeing |

### **Societal wellbeing as a neglected field:**

- ✦ impressions of societal progress and functioning are widely missing in wellbeing-research, although cross-national survey instruments (e. g. WVS, ISSP, EVS, ESS, EQLS) offer a broad reservoir of data
- ✦ Some efforts to promote this new research field (e.g. Harrison, Jowell & Sibley, 2011; Harrison & Stoop, 2012)
- ✦ Theoretically driven, multidimensional concepts are not yet established
- ✦ Important challenge in Europe-wide research to take subjective crises perceptions of European citizens more adequately into account, to monitor societal wellbeing over the years and to search for comparable and equivalent indicators



## Key dimensions of societal wellbeing

### 2. A successful example: Societal wellbeing in Europe

#### 2.1. Dimensions of societal wellbeing

- 2.2. Empirical analysis
  - 2.2.1. Evaluation of the model (testing for equivalence)
  - 2.2.2. Monitoring societal wellbeing in Europe (based on ESS data)
  - 2.2.3. Explaining differences (a multilevel analysis)

#### 1. Fear of societal decline

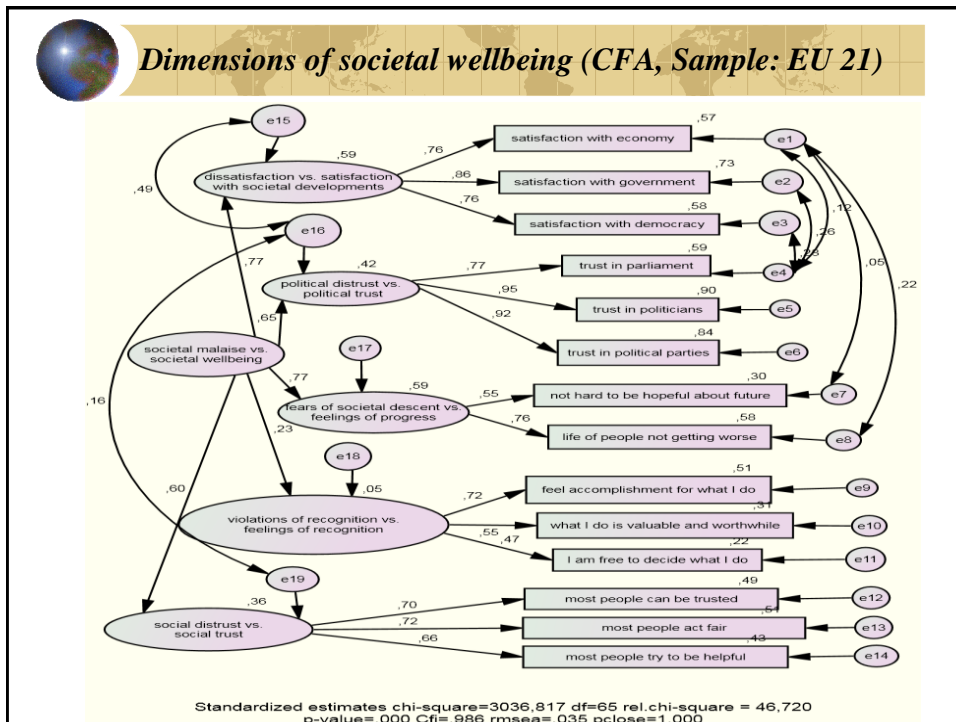
- ✦ Middle-class experiences are often based on comparisons (relative deprivation, nostalgia)
- ✦ Changes in expectations (societal pessimism)
- ✦ Precarization at the lower bottom of society (feelings of neglect vs. recognition)

#### 2. Political disenchantment

- ✦ Anomie in contemporary society reflects a lack of certainty in expectations
- ✦ Citizens' need to search for easy solutions to complex societal problems
- ✦ shifts from political alienation to a 'post-truth' era of politics

#### 3. Social distrust

- ✦ High pressures in meritocratic societies (egocentrism may win over solidarity)
- ✦ Issue of immigration is mainly responsible for the sharp polarization of values
- ✦ Specific groups are identified as "significant others" (ethnocentrism)



**The challenge of equivalence**

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**Equivalence:**

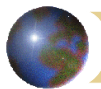
- ✦ The same structure of relations has to exist in every single nation-state
- ✦ Construct equivalence is necessary at item, scale and concept level

**Cultural invariance test (MGCFA) as state of the art:**

- ✦ First step: configural equivalence  
(the same items should belong to the concept)
- ✦ Second step: metric equivalence  
(factor loadings of all items should be considered as equal)
- ✦ Third step: scalar equivalence  
(item intercepts should be considered as equal)

→ Recent methodological articles (see Davidov et al. 2014) clearly demonstrate that full scalar invariance is barely fulfilled in cross-national research (partial invariance or new alignment method as potential solution)

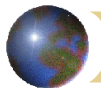




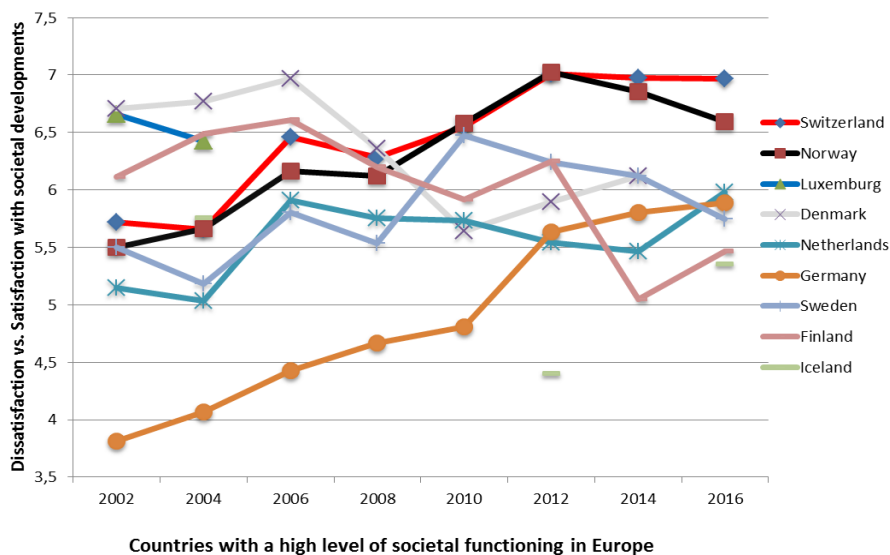
## Equivalence testing (MGCFA)

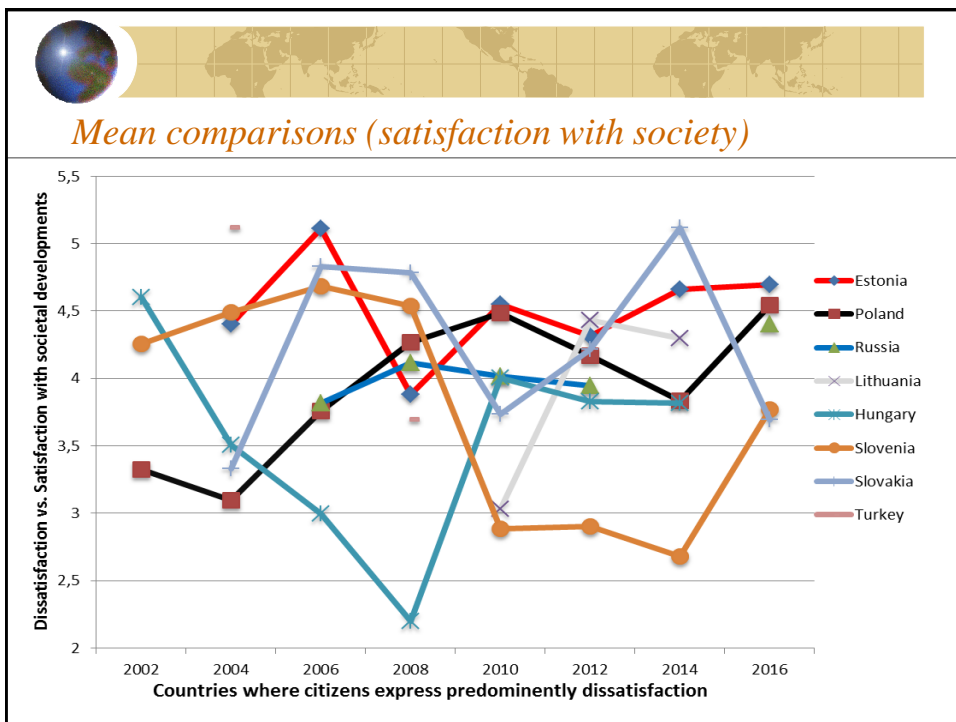
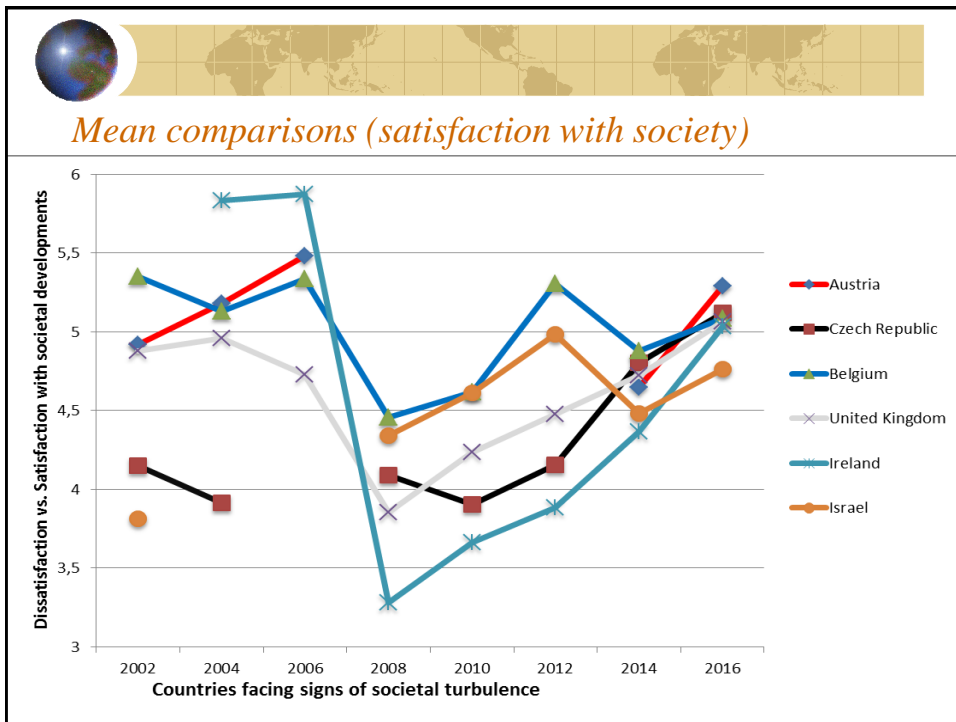
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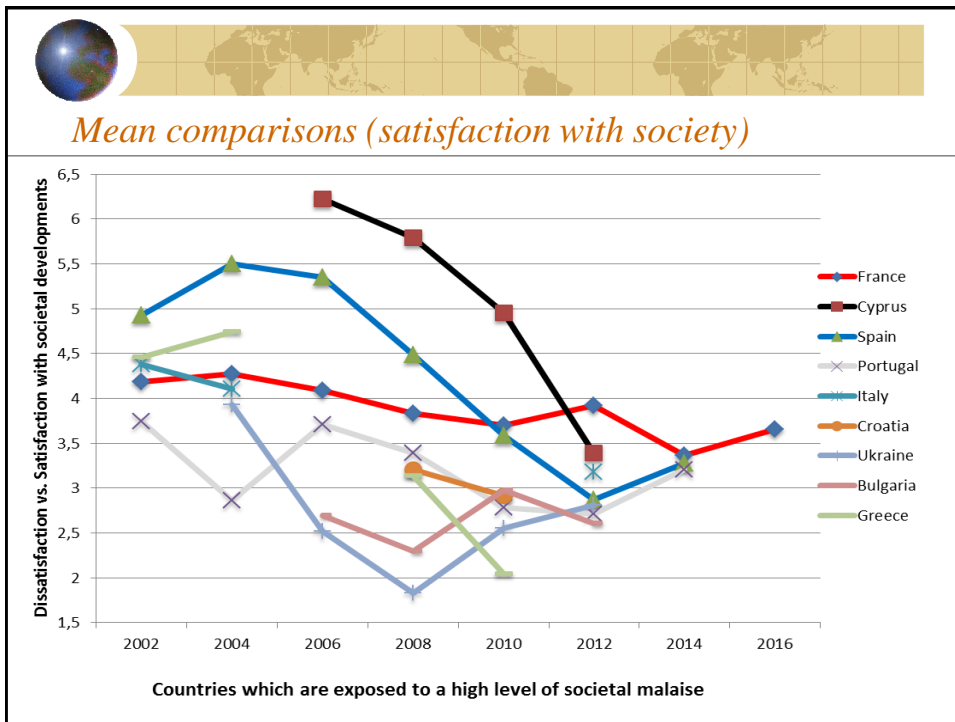
| Model  | Chi <sup>2</sup> | df   | Chi <sup>2</sup> / df | Sig.    | RMSEA | PCLOSE | CFI   |
|--|------------------|------|-----------------------|---------|-------|--------|-------|
| 1. Configural invariance   | 5821,4           | 1344 | 4,33                  | p<0,001 | 0,009 | 1,000  | 0,980 |
| 2. Metric invariance<br>(first order factors)                                      | 7288,3           | 1524 | 4,78                  | p<0,001 | 0,010 | 1,000  | 0,974 |
| 3. Metric invariance<br>(second order factors)                                     | 8055,6           | 1604 | 5,02                  | p<0,001 | 0,010 | 1,000  | 0,971 |
| 4. Scalar invariance<br>(Indicators)   | 41791,1          | 1884 | 22,2                  | p<0,001 | 0,023 | 1,000  | 0,819 |
| 5. Partial scalar<br>invariance<br>(release of indicators<br>1,3,4,6,8,9,11,12,14) | 24371,7          | 1704 | 14,30                 | < 0,001 | 0,018 | 1,000  | 0,897 |



## Mean comparisons (satisfaction with society)







**Multilevel-Analysis – individual predictors of societal wellbeing**

| Levels of analysis                    | Predictors                            | Indicators            | Model 1:<br>Empty model | Model 3:<br>Predictors of individual and country level | Model 5:<br>Predictors of individual and country level and welfare state classification |
|---------------------------------------|---------------------------------------|-----------------------|-------------------------|--|---|
| Explained variance                    | Individual level                      |                       |                         | 22,1%  | 22,1%   |
|                                       | Contextual level                      |                       |                         | 85,7%  | 91,2%   |
|                                       | ICC                                   |                       |                         | 0,31   | 0,08  |
| Socio-demographic level               | Intercept                             |                       | 4,71                    | 4,64   | 5,46  |
|                                       | Gender (0 = female, 1 = male)         |                       |                         | -0,06***   | -0,06 (-0,02)***  |
|                                       | Age                                   |                       |                         |  |   |
|                                       | Domicile (Ref. countryside)           | Large cities          |                         |  |   |
|                                       |                                       | Small cities          |                         | -0,04**  | -0,04 (-0,01)**   |
|                                       | Foreign born                          |                       |                         | 0,06**   | 0,06 (0,01)**   |
|                                       | Religiosity                           |                       |                         | 0,04***  | 0,04 (0,08)***  |
| Individual predictors                 | Unconv. political engagement          |                       |                         | -0,07***   | -0,07 (-0,02)***  |
|                                       | Voluntary engagement                  |                       |                         | 0,13***  | 0,13 (0,04)***  |
|                                       | Social inclusion index                |                       |                         | 0,10***  | 0,10 (0,08)***  |
|                                       | Education (Ref. ISCED 5-6)            | Low (0-2)             |                         | -0,34***   | -0,34 (-0,11)***  |
|                                       |                                       | Medium (3-4)          |                         | -0,26***   | -0,26 (-0,09)***  |
|                                       | Employment relation (Ref. retired)    | Permanent (full-time) |                         |  |   |
|                                       |                                       | Part Time             |                         |  |   |
|                                       |                                       | Temporary             |                         |  |   |
|                                       |                                       | Solo-self employed    |                         |  |   |
|                                       | In education (Ref. Housewife/-men)    | In education          |                         | 0,35***  | 0,35 (0,07)***  |
|                                       |                                       | Housewife/-men        |                         |  |   |
|                                       |                                       | Unemployed            |                         | -0,16***   | -0,16 (-0,03)***  |
|                                       | Subjective estimation (social status) | Unemployed            |                         | -0,26***   | -0,26 (-0,03)***  |
| Disabled                              |                                       |                       |                         |  |   |
| Subjective estimation (social status) |                                       |                       | 0,19***                 | 0,19 (0,23)***   |   |
| Dealing with household income         |                                       |                       | 0,46***                 | 0,46 (0,15)***   |   |



## Multilevel-Analysis – contextual predictors of societal wellbeing

| Levels of analysis | Predictors   | Indicators    | Model 1:<br>Empty model | Model 3:<br>Predictors of<br>individual and<br>country level | Model 5:<br>Predictors of<br>individual and country<br>level and welfare state<br>classification |                 |
|--------------------|--|---------------|-------------------------|--|--|-----------------|
| Explained variance | Individual level   |               |                         | 22,1%  | 22,1%  |                 |
|                    | Contextual level   |               |                         | 85,7%  | 91,2%  |                 |
|                    | ICC  |               | 0,31                    | 0,08   | 0,05   |                 |
|                    | Intercept  |               | 4,71                    | 4,64   | 5,46   |                 |
| Macro-predictors   | GDP / capita 2012  |               |                         | 0,02 (0,34) ***  |  |                 |
|                    | Public debt (% of GDP)                                   |               |                         | -0,01 (-0,22) ***  |  |                 |
|                    | Quality of democracy (KID)                               |               |                         | 0,30 (0,13) +  |  |                 |
|                    | Migration background                                     |               |                         | -0,03 (-0,09) <sup>+</sup>                                   |  |                 |
|                    | Welfare state<br>typology<br>(Ref. social<br>democratic) | conservative  |                         |  |  | -0,70 (-0,21)*  |
|                    |  | liberal       |                         |  |  | -0,79 (-0,18)*  |
|                    |  | mediterranean |                         |  |  | -1,47 (-0,36)** |
| corporate          |  |               |                         | -1,05 (-0,30)**  |  |                 |
|                    | rudimentary  |               |                         |  | -0,73 (-0,19) <sup>+</sup>   |                 |



## Explaining differences: main results

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### Methodological achievements:

- ✦ Theory-guided multidimensional conception of societal malaise
- ✦ Cross-national equivalence partly achieved (mainly within European regions)
- ✦ Results indicate to take differences between regions adequately into account

### Contextual effects of societal malaise:

- ✦ Social integration in Scandinavia is still fulfilled due to economic prosperity, quality of democracy and lower public debt
- ✦ Fears of societal decline in conservative welfare states (due to increasing debt) and precarious situation in liberal countries (due to withering of welfare state)
- ✦ Highest amount of future pessimism in Southern Europe (due to negative economic prospects, extraordinary high public debt, unemployment)
- ✦ Societal malaise in Eastern Europe is mainly due to lower quality of democracy



## Wellbeing and content validity

3. **An unsolved puzzle: How to move beyond the nation state?**  
 3.1. **The challenge to develop culture-sensitive concepts**  
 3.2. Potential solution: a culture-specific loopway to reach the goal of content validity

### The challenge of culture-sensitive concepts:

- ✦ We need concepts which are appropriate for more fine-tuned regions or for specific societal groups (culture ≠ nation)
- ✦ Focus on content validity instead of comparability
- ✦ New units of analysis?

### Example WED-Group:

- ✦ WeD-QoL represents a system of indicators that is planned for developing countries (emic research perspective)
- ✦ *"Wellbeing is both a state and a process, and it is multi-dimensional. It cannot be simply equated with wealth, happiness or goal satisfaction. Similarly, ill-being cannot be simplistically equated with material poverty, misery or frustrated goal achievement."* (WeD, 2007, p. 2).
- ✦ A plea for qualitative research: *"by researchers that are culturally close to the research sites, speak the native language and quickly understand the subtleness of cultural symbols."* (Yamamoto, 2007)



## Wellbeing and content validity

3. **An unsolved puzzle: How to move beyond the nation state?**  
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### A potential solution: the culture-specific loop way

1. Qualitative research to explore the most important facets of the concept (culture-based)
2. Operationalization of the construct for further quantitative research and first empirical evaluations within the country (e.g. reliability measures, PCS, CFA etc.)
3. After establishing content validity, start of potential comparisons
4. Decision about comparability (a small interface of comparable indicators may prevent further comparisons while a larger set of appropriate items may allow comparisons)
5. Evaluation of the comparability of the concept with sophisticated statistical methods
6. Checking comparability in alternative units (e.g. transnational or intranational) to clarify the relevance of the concept in different subcultures

### The goal of content validity:

- ✦ concepts need to be – in the ideal case – entirely and exhaustively measured in all cultures
- ✦ E.g. immigrant populations or children: What is good life for them?
- ✦ numerous concepts are developed for nation states or for cross-national analysis but they may reflect inappropriate measurements for other cultural contexts



## Appendix: Model of the culture-specific loopway

### Steps of construct evaluation

1. Gathering the main facets of a concept adopting an emic perspective (culture specific qualitative research)
2. Evaluation of concept validity within cultures (with reliability analysis, EFA; MCA (culture specific quantitative research within countries))
3. Comparison of concepts between cultures or countries
4. Derivation of comparable indicators and decision about cross-cultural comparison
5. If there is an appropriate number of comparable items (MGCFA at country level)
6. Supplementary evaluation of the concept (transnational and intranational)

### Cultures / Countries

