

Introduction

Notions of subjective well-being or happiness have a long tradition as central elements of quality of life, but until very recently these concepts were generally deemed beyond the scope of statistical measurement. Over the last two decades, however, an increasing body of evidence has shown that subjective well-being can be measured in surveys, that such measures are valid and reliable, and that they can usefully inform policy-making. This evidence has been reflected in an exponential growth in the economic literature on measures of subjective well-being.¹

Reflecting the increasing interest in subjective well-being from both researchers and policy-makers, the *Report by the Commission on the Measurement of Economic Performance and Social Progress* (2009) recommended that national statistical agencies collect and publish measures of subjective well-being. In particular, the Commission noted that:

*Recent research has shown that it is possible to collect meaningful and reliable data on subjective well-being. Subjective well-being encompasses three different aspects: cognitive evaluations of one's life, positive emotions (joy, pride), and negative ones (pain, anger, worry). While these aspects of subjective well-being have different determinants, in all cases these determinants go well beyond people's income and material conditions... All these aspects of subjective well-being should be measured separately to derive a more comprehensive measure of people's quality of life and to allow a better understanding of its determinants (including people's objective conditions). National statistical agencies should incorporate questions on subjective well-being in their standard surveys to capture people's life evaluations, hedonic experiences and life priorities.*²

The guidelines presented here represent a step towards making the Commission's recommendations a reality. They are intended to provide guidance and assistance to data producers, and particularly national statistical agencies, in collecting and reporting measures of subjective well-being, as well as providing advice and assistance in the analysis of subjective well-being data to users of the data.

Motivation

Recent initiatives

The OECD recently characterised its mission as “better policies for better lives”. This implies a concern with the nature and drivers of people's well-being. In order to develop better policies, it is essential to understand what constitutes “better lives” for the citizens of OECD countries. This concern with what constitutes well-being and how well-being should be measured has been reflected in OECD work, including the activities related to the OECD-hosted Global Project on Measuring the Progress of Societies and the associated series of World Forums on Statistics, Knowledge, and Policy held in Palermo (2004), Istanbul (2007), Busan (2009) and Delhi (2012). More recently, building on the foundations set out by the

Report of the Commission on the Measurement of Economic Performance and Social Progress (the Sen/Stiglitz/Fitoussi Commission), the OECD has developed tools that allow users to build their own measure of average well-being across countries, through the *Your Better Life Index*.

Following on from the *Commission on the Measurement of Economic Performance and Social Progress*, a number of statistical agencies have launched initiatives aimed at measuring subjective well-being. These include the UK initiative (launched in November 2010) to develop a new set of measures of national well-being (combining both subjective and objective measures) and the steps taken by Eurostat to develop a module on well-being for the 2013 wave of EU-SILC.³ Similarly, the French national statistical office, INSEE, has developed a well-being module for the national component of EU-SILC and has collected information on affect in the *Enquête Emploi du temps 2009-2010*. In the United States, a well-being module has also been included in the most recent wave of the American Time Use Survey. Also, the US National Academy of Sciences has established a panel on *Measuring Subjective Well-Being in a Policy Relevant Framework*. In Italy, the national statistical office has recently published its first official measures of life satisfaction as part of its general social survey (*Indagine Multiscopo*). In the Netherlands, the national statistical office is currently scoping a module on subjective well-being for one of its surveys to go into the field (if approved) in late 2011/12. Plans to collect data on subjective well-being as part of their official statistical systems were also recently announced by Japan and Korea.

A number of national statistical agencies have collected data on subjective well-being even before the recommendations of the *Commission on the Measurement of Economic Performance and Social Progress*. In Canada, Statistics Canada has collected information on subjective well-being in the General Social Survey since 1985 and published this information as part of data releases from the survey for some time. The national statistical office of New Zealand also collects data on life satisfaction through the New Zealand General Social Survey, and this forms a core component of its data release. The Australian Bureau of Statistics has collected information on subjective well-being in a number of vehicles, including the 2001 National Health Survey and the Australian General Social Survey.

The need for guidelines

The use of international concepts and measurement methodology is fundamental to official statistics. Such standards contribute to quality by ensuring that best practice is followed internationally and that official statistics are internationally comparable. This is reflected in the *UN Fundamental Principles of Official Statistics*. In particular, principle 9 states that:

The use by statistical agencies in each country of international concepts, classifications and methods promotes the consistency and efficiency of statistical systems at all official levels.

Although measures of subjective well-being are now available from both official and non-official sources for an increasing range of countries, these measures currently lack commonly accepted international guidelines for their collection and dissemination. The only measures of subjective well-being on which cross-country comparisons can currently be made on a consistent basis are derived from non-official sources, and these face limitations associated with relatively small sample sizes, limitations of sample design and low survey response rates (Box 1).

Box 1. **Non-official sources of subjective well-being data**

Measures of subjective well-being are not currently collected in a systematic and consistent way across OECD national statistical agencies. While a number of OECD countries do collect measures of subjective well-being as part of their official statistics, and in some cases have been doing so for some time, official measures currently lack the consistency needed for them to be used as the basis for international comparisons. There are, however, a number of datasets currently available that contain measures of subjective well-being covering a wide range of countries. Indeed, much of the current body of knowledge regarding the validity and properties of measures of subjective well-being is derived from the analysis of these non-official datasets.

The two largest datasets containing comparable measures of subjective well-being are the Gallup World Poll and the World Values Survey. The Gallup World Poll started in 2005, and now covers 132 countries; the sample size is about 1 000 respondents per country per wave, with plans to increase such sample size to 4 000 respondents in all countries with a population of 25 million and over by 2012. The Gallup World Poll is an annual survey and includes measures of life evaluation and a range of questions related to current mood and emotional experiences (affect). The World Values Survey has a longer history (although with uneven sampling quality), with the first wave having been collected between 1981 and 1983 and covering 15 countries. There have been four subsequent waves, with the most recent wave collected between 2005 and 2008 and covering 56 countries. A sixth wave is currently being collected (2011-12). The World Values Survey contains measures of life evaluation and overall happiness, as well as more focused measures of experienced mood and aspects of psychological well-being in the more recent waves.

While the Gallup World Poll and the World Values Survey are usually taken as providing a reference point for questions on subjective well-being across countries, there are a number of additional surveys that complement these in various ways. The European Social Survey provides information on a number of aspects of subjective well-being for a varying range of European countries between 2002 and 2010. In the 2006 wave of the European Social Survey, a module was included to collect detailed information on the “eudaimonic” aspects of well-being (i.e. meaning, purpose, flourishing), thus expanding the range of subjective well-being concepts measured beyond evaluations and affect. A repeat of this module will be carried out in 2012. In addition, the triennial European Quality of Life Survey contains extensive information on subjective well-being.

Eurobarometer is a regular opinion survey covering European Union nations that has been collected since 1973. Although the subjective well-being questions contained in Eurobarometer are relatively limited, they provide the longest unbroken time series for measures of subjective well-being for a cross-section of countries. Similar questions have also been included in several waves of the Latinobarómetro.

In addition to these cross-sectional surveys, a number of panel surveys have been widely used by researchers to analyse subjective well-being. In particular, the German Socio-Economic Panel and the British Household Panel Study are high-quality panel surveys that include information on subjective well-being. The German Socio-Economic Panel dates back to 1984 and runs to the present day, with a total sample of over 12 000 households. By comparison, the British Household Panel Study dates back only to 1991, but has recently been integrated into the UK Household Longitudinal Study (also known as “Understanding Society”), with a total sample of over 40 000 households. Because both of these studies follow the same person through time, they have been crucial in allowing researchers to understand the interaction between unobserved personality traits, life-events, environmental changes (including policy changes) and responses to subjective well-being questions.

Although non-official data sources have provided much information on subjective well-being, they do have several distinct limitations. With the exception of the large panel studies, most non-official data sources have relatively small sample sizes that limit the conclusions which can be reached about changes in levels of subjective well-being and differences between groups. Many of the main non-official surveys also are affected by low response rates and have sample frames that are not as representative as is the case for official surveys. Finally, the developers of non-official surveys often have fewer resources available for cognitive testing and survey development than is the case for national statistical offices. Thus, although existing non-official data sources have provided a great deal of information on subjective well-being, there remain a range of questions that will not be answered until high-quality large-scale official surveys are available.

While the academic literature contains extensive information about which subjective well-being measures to collect and how to collect them, no consistent set of guidelines currently exist for national statistical agencies that wish to draw on this research. For official measures of subjective well-being to be useful as indicators of national progress, these official measures should be collected in a consistent manner, which, in turn, requires an agreed way to collect such measures. This drives the need for developing commonly accepted guidelines around the measurement of subjective well-being, even if such guidelines will need to be revised in the future as more information becomes available on subjective well-being.

Guidelines are also needed because subjective well-being measures are strongly affected by question structure and context, and the results from differently worded questions (or even a different ordering of similar questions) are likely to affect comparability. Yet comparability is a key point of interest for decision-makers, who will often want to benchmark the progress of one region, country or population group against another. While interpreting such comparisons can be difficult due to issues such as cultural biases in response styles, consistency in measurement can eliminate other potential sources of bias. It is important that, where there are differences in measured levels of subjective well-being, these are not falsely attributed some significance when, in fact, the difference actually reflects the impact of question wording or context.

The guidelines

Scope and objectives

The aim of the project is to prepare a set of guidelines addressed to national statistical offices on the collection and use of measures of subjective well-being. This includes first and foremost measures of how people experience and evaluate life as a whole. Over-arching measures of this sort have been the main focus for academic analysis of subjective well-being and are therefore the best understood measures of subjective well-being, including because they reflect people's experiences and evaluations of all the different aspects of life, and therefore bring the most additional information to existing outcome measures such as income, health, education and time use. Despite this, the guidelines do also attempt to provide advice on people's evaluations of particular domains of life, such as satisfaction with their financial status or satisfaction with their health status as well as "eudaimonic"⁴ aspects of subjective well-being. These measures are both of high interest for policy purposes and also methodologically similar to the more general questions on overall subjective well-being.

The guidelines do not attempt to address subjective measures of objective concepts. Measures of this sort, such as self-rated health or perceived air quality, are outside the scope of this project. While the measurement technique for questions of this sort is subjective, the subject matter is not, and such questions pose different methodological issues in measurement.

This report will outline both why measures of subjective well-being are relevant for monitoring the well-being of people and for policy design and evaluation and why national statistical agencies have a critical role in enhancing the usefulness of existing measures. The report will identify the best approaches for measuring in a reliable and consistent way the various dimensions of subjective well-being and will provide guidance for reporting on such measures. The project also includes the development of prototype survey modules on subjective well-being that national and international agencies could take as a starting point when designing their national surveys and undertaking any further testing and development.

The production of a set of guidelines on measuring subjective well-being by the OECD is expected to contribute to greater consistency in measurement of subjective well-being in official statistics. In particular, these guidelines are intended to:

- Improve the quality of measures collected by national statistical offices by providing best practice in question wording and survey design.
- Improve the usefulness of data collected by setting out guidelines on the appropriate frequency, survey vehicles and co-variables when collecting subjective well-being data.
- Improve the international comparability of subjective well-being measures by establishing common concepts, classifications and methods that national statistical agencies could use.

These guidelines do not by any means represent the final word on the measurement of subjective well-being. Although some aspects of the measurement of subjective well-being – such as questions on overall satisfaction with life – are very well understood, other potentially important measures currently draw on much weaker evidence bases. It is to be expected that the evidence base on subjective well-being will develop rapidly over the next few years. In particular, to the degree that national statistical offices start regularly collecting and publishing data on subjective well-being, many methodological questions are likely to be resolved as better data becomes available, and an increasing body of knowledge will accumulate around the policy uses of subjective well-being data.

It is envisaged that these guidelines will be followed up by a review of progress on the measurement of subjective well-being over the next few years, with a view to deciding whether the guidelines need revising and whether it is possible and desirable to move towards a greater degree of international standardisation. The intent is that this review will build on information collected by national statistical agencies, and will consider the feasibility of eventual moves towards a more formal international standard for the measurement of subjective well-being.

The structure of the guidelines

The guidelines are organised in four chapters. Chapter 1 focuses on the issues of concept and validity. This chapter addresses the issue of what subjective well-being “is” and describes a conceptual framework for subjective well-being, including a clear over-arching definition of the scope of subjective well-being and how this relates to broader notions of quality of life. The issue of the reliability and validity of measures of subjective well-being is also addressed, with a review of the evidence on validity. Finally, the chapter provides an overview of some of the limitations of subjective well-being measures, setting out some of the known problems and shortcomings.

The second chapter focuses on the methodological issues that should inform the selection of measures of subjective well-being through surveys. This chapter is framed around issues of survey mode, survey flow and question design. In particular, the chapter covers the impact of issues related to question order, question placement within the survey, question wording, scale formats and labelling, day and time effects and biases due to social desirability. In addition to identifying the key methodological issues raised, Chapter 2 makes recommendations on the best approach to mitigate the effect of various sources of bias.

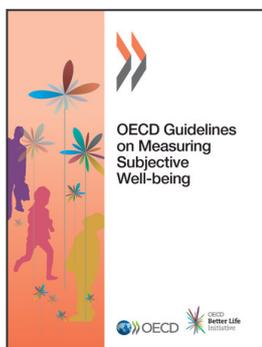
Chapter 3 sets out an over-arching strategy for the measurement of subjective well-being. This covers both the range of concepts that should be measured and the choice of survey vehicles for measuring them. Issues of sample design and the statistical units to be measured are discussed, as well as the most appropriate range of co-variates to collect along with the subjective measures of well-being. The specific suite of measures proposed will also be outlined.

The final chapter sets out guidelines for the output and analysis of subjective well-being data. The first section of the chapter covers the issues associated with basic reporting of subjective well-being data, including what constitutes meaningful change and issues such as whether to report average scores or the proportion of the population relative to a threshold of some sort. The second part of the chapter gives a more detailed treatment of the use of subjective well-being data.

Annex A of the guidelines provides illustrative examples of different types of subjective well-being questions that have been used previously throughout the world. It is intended primarily to help users of the guidelines understand the methodological references to specific question types made in Chapter 2. Annex B contains six prototype question modules for national statistical agencies and other producers of subjective well-being data to use as models for their own questions. Module A (core measures) contains a primary measure of subjective well-being that all data producers are strongly encouraged to include as a baseline measure, along with four additional questions that should also be regarded as highly desirable to collect wherever space permits. The remaining five modules provide more detailed information that may be used by data producers where more detailed information on one of the dimensions of subjective well-being is considered a priority.

Notes

1. During the 1990s there was an average of less than five articles on happiness or related subjects each year in the journals covered by the *Econlit* database. By 2008 this had risen to over fifty.
2. *Report by the Commission on the Measurement of Economic Performance and Social Progress*, Stiglitz, J.E., A. Sen and J.P. Fitoussi, 2009, p. 216.
3. The European Union Statistics on Income and Living Conditions (EU-SILC) is an instrument aimed at collecting timely and comparable cross-sectional and longitudinal data on income, poverty, social exclusion and living conditions. It is run in all European Union countries and some outside the EU, including Turkey, Norway, Iceland, Croatia, Serbia and Switzerland.
4. The term “eudaimonic” derives from the Greek word *eudaimonia*, which Aristotle used to refer to the “good” life. Eudaimonia implies a broader range of concerns than just “happiness”. While Aristotle argues that happiness is necessary for eudaimonia, he believes it is not sufficient. Modern conceptions of eudaimonic well-being, although differing from Aristotle in the detail, focus on subjective well-being perceived more broadly than simply one’s evaluation of life or affective state.



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