

ARTICLES

Revision and Cross-cultural Adaptation of the Human Values Scale for Self-completion Modes

Elena Sommer¹, Brita Dorer², Ulrike Efu Nkong², Tim Hanson³, Sabine Zinn^{1,4}, Shalom H. Schwartz⁵

¹ Socio-Economic Panel (SOEP), German Institute for Economic Research, ² GESIS - Leibniz-Institute for the Social Sciences, ³ European Social Survey (ESS), City St George's, University of London, ⁴ Humboldt-Universität zu Berlin, ⁵ Hebrew University of Jerusalem

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Since its first round, the European Social Survey (ESS) has included a 21-item measure of ten basic human values shared across cultures, known as the Human Values Scale (HVS), developed by Shalom H. Schwartz. Recently, the scale has been revised to a new 20-item HVS with shorter, simpler items (usually only one sentence instead of two sentences per item in the past version) and introducing a single gender-neutral version. This latter change is crucial as the ESS transitions to a self-completion mode using online and paper questionnaires. To ensure consistent measurement across countries and languages, the ESS included the new scale in its ESS Round 12 Advance Translation, creating a detailed list of annotations to clarify the source items' meanings. The new HVS has also been fielded in the German Socio-Economic Panel (SOEP) in 2025, including a refugee sample. A multilingual cognitive interview pretest assessed the consistency of interpretations among respondents with diverse migration backgrounds. Findings from the ESS translation efforts and the SOEP cognitive interview pretest were instrumental in refining the final version of the new HVS. This note provides an overview of the revised HVS and addresses the challenges of cross-cultural adaptation.

Background

Values theory

The original values theory identified 10 basic human values that people across cultures distinguish (Schwartz 1994). A review and refinement of the values theory was carried out in 2012 and the current version includes 19 nuanced values (Schwartz et al. 2012, [Table 1](#)), which is believed to enhance the precision of explanations and predictions. These values are organized into a circular structure according to the extent to which they motivate compatible or conflicting goals ([Figure 1](#)).

Human Values Scale

From its first to its 11th round, the European Social Survey (ESS) included a 21-item battery known as the Human Values Scale (HVS) to measure basic values cross-nationally (Schwartz 2003). Respondents were presented with a range of descriptions of people (e.g. "It is important to [her/him] to

Table 1. Overview of ten original basic values and corresponding refined values

Original basic values	Refined values
Self-direction	Self-direction: Autonomy of thought
	Self-direction: Autonomy of action
Stimulation	Stimulation
Hedonism	Hedonism
Achievement	Achievement
Power	Power: Dominance over people
	Power: Wealth and material resources
Security	Security: Personal
	Security: Societal
Tradition	Tradition
Conformity	Conformity: Rules
	Conformity: Interpersonal
Benevolence	Benevolence: Dependability
	Benevolence: Caring
Universalism	Universalism: Concern
	Universalism: Nature
	Universalism: Tolerance
	Face
	Humility

be humble and modest. [She/He] tries not to draw too much attention to [herself/himself]”) and asked how much they were like this person, on a scale from “Very much like me” to “Not like me at all”.

Starting from Round 12 of the ESS (2025-26), a new version of the Human Values Scale has been implemented. It will remain a part of the ESS core questionnaire, i.e., included in every ESS round. In addition to the need to adapt the scale to the refined theory, the change was also driven by the ESS transition from face-to-face interviewing to self-completion modes of data collection (online and paper). The new scale is shorter (in terms of the number of items and the length of each item) and, we believe, it is more user-friendly and more suitable for self-completion modes.

The new HVS can provide scores for both the 10 and 19 basic values. Although the transition results in a loss of consistency in time series data, as due to differences in item content and format, and scores from the previous HVS cannot be directly compared with those from the new version, the relative importance of the values within and across countries is expected to remain largely stable. However, this assertion will remain unverified until the data is collected and analyzed.

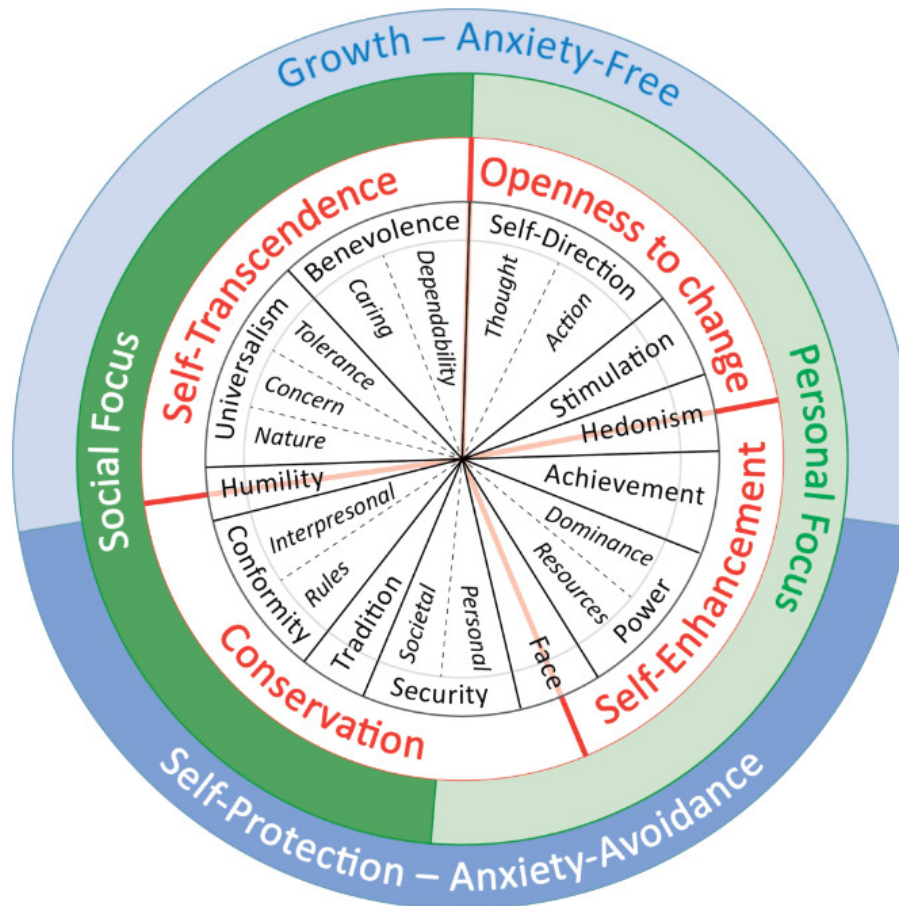


Figure 1. The circular structure of compatible and conflicting values

Development of the new Human Values Scale

Revision to the item statements

The new HVS uses a very similar introduction and the identical response scale as its predecessor, but introduces two significant changes (see examples in [Table 2](#)):

1. Each item now consists of a single statement instead of two statements as in the previous version.
2. Statements are gender-neutral, moving away from gender-specific wording. All items begin with the phrase, “It is important to this person...” and use gender-neutral pronouns in grammatical plural (e.g. “they/their/them”).

The previous HVS for the ESS had separate versions for male and female respondents, determined by an interviewer-coded sex variable. With the shift to a self-completion approach, a single gender-neutral version was deemed

Table 2. Two examples that compare the previous and new Human Values Scale

Value	Previous scale Separate questionnaire versions for males and females	New scale One version for all genders
Self-direction • Autonomy of thought	Thinking up new ideas and being creative is important to [him/her]. [He/She] likes to do things in [his/her] own original way.	It is important to this person to develop their own opinions.
Conformity • Rules	[He/She] believes that people should do what they're told. [He/She] thinks people should follow rules at all times, even when no-one is watching.	It is important to this person never to violate rules or regulations.

necessary, especially since a paper questionnaire would require printing both versions, increasing page count and costs. In addition, the binary male/female division excluded non-binary individuals.

The new scale uses one statement instead of two reducing respondent burden and addresses the issue of double-barrelled items, a common criticism of the previous HVS. The first version of the new scale was provided by Shalom H. Schwartz, based on items from his previous research (Schwartz and Cieciuch 2022). The adaptation process included several steps:

1. Review by ESS Core Scientific Team (including ESS Translation Team) to propose suitable gender-neutral wording.
2. Consultation with ESS national teams (pre- and post-pilot) to ensure the scale's applicability across languages and cultures.
3. Advance translation of proposed items into German, Italian, Lithuanian, Polish, and Serbian. This step is carried out systematically to enhance translatability of ESS source questionnaires (Dorer 2023).
4. A self-completion pilot of the full ESS Round 12 questionnaire in Bulgaria and Ireland, which did not reveal major concerns for the new HVS.

These steps ensured that the new scale did not contain major problems for translation into multiple languages and was overall ready for implementation in the upcoming ESS Round 12. The 20 new items and the corresponding values are presented in [Table 3](#). The ESS team consulted with Shalom H. Schwartz throughout the process of developing the items and the final version (including translation notes) was approved by him.

Translation

As part of the ESS Round 12 mainstage translation process, the TRAPD (Translation, Review, Adjudication, Pretest, Documentation) procedure was implemented to ensure high-quality survey translation (Dorer 2022). The

Table 3. Revised 20-item Human Values Scale and corresponding values

Value		Item (item's order in the scale)
Self-direction	Autonomy of thought	(1) It is important to this person to develop their own opinions.
	Autonomy of action	(17) It is important to this person to make their own decisions about their life.
Stimulation		(11) It is important to this person to have all sorts of new experiences.
Hedonism		(3) It is important to this person to enjoy life's pleasures.
Achievement		(5) It is important to this person to be very successful.
		(20) It is important to this person that their achievements are recognized by other people.
Power	Dominance over people	(7) It is important to this person to have the power to make others comply with what they want.
	Wealth & material resources	(13) It is important to this person to be wealthy.
Face		(10) It is important to this person never to be humiliated.
Security	Personal	(14) It is important to this person to be personally safe and secure.
	Societal	(2) It is important to this person that the state is strong and can defend its citizens.
Tradition		(18) It is important to this person to follow traditions. These might be cultural, family or religious traditions.
Conformity	Rules	(16) It is important to this person never to violate rules or regulations.
	Interpersonal	(4) It is important to this person never to make other people angry.
Humility		(8) It is important to this person to be humble.
Benevolence	Dependability	(19) It is important to this person that the people they know have full confidence in them.
	Caring	(12) It is important to this person to help the people close to them.
Universalism	Concern	(6) It is important to this person that everyone be treated justly, even people they don't know.
	Nature	(9) It is important to this person to protect the natural environment from pollution or destruction.
	Tolerance	(15) It is important to this person to be tolerant towards all kinds of people and groups.

translations of the HVS were additionally verified by the external service provider cApStAn. To ensure cross-national comparability of the scale, the meaning of the 20 new items and possible translation issues were discussed at the ESS Round 12 Adjudicators and Translators meeting in January 2025, which included the scale's developer, Shalom H. Schwartz. The revised HVS is considered new text, meaning that items should be translated from scratch and that they represent new items in the ESS time series.

One of the main challenges in translation was the use of gender-neutral language. This included the absence of a gender-neutral plural “they” in most other languages used in the ESS, necessitating the implementation of alternative gender-inclusive solutions beyond the binary he/she scheme. While some languages offer various gender-neutral options, they can sometimes impair readability or lack wide social acceptance. Consequently, it was decided to accept the grammatical gender of “this person” for the corresponding pronoun when alternatives were not feasible (for instance “la personne” resulting in the feminine pronoun “elle” in French).

The translation instructions emphasized the need to follow the “ask-the-same-question approach” (Harkness et al. 2010). This approach ensures comparability across languages by requiring that the wording of the English source text be translated rather than directly implementing concept descriptions in the target language. Detailed annotations were developed to guide translators (see example in [Figure 2](#)).

Figure 2. Example of translation annotations

E1 It is important to this person to develop their own opinions.

- ‘develop’ in the sense of independently building up (their own opinions)
- ‘their’ is not meant in the sense of plural, but in the sense of a gender-neutral pronoun. If this option does not exist in your language, please translate using the most gender-neutral way of expression.
- ‘opinions’ in the sense of “views”

Cognitive interview pretest with participants of different migration backgrounds

Empirical evidence from previous research shows that people in over 60 countries discriminate among the 19 refined values (Schwartz and Cieciuch 2022). However, there is limited evidence regarding the suitability of the HVS for surveying individuals with migration or refugee backgrounds. Surveying refugees presents various psycho-social challenges, such as emotional distress and altered perceptions of time among traumatized individuals (Stathopoulou et al. 2019).

In 2025, the German Socio-Economic Panel (SOEP, see Goebel et al. 2019) included the new HVS for the first time in its core (SOEP-CORE) and in refugee samples (IAB-BAMF-SOEP Survey of Refugees, see Brücker et al. 2025). It was part of a self-completion module on social distance, utilising the new HVS scale, the same as used in ESS Round 12, supported by pictogram-like images developed in consultation with Shalom H. Schwartz. To assess the revised HVS’s suitability for individuals with different migration backgrounds, a cognitive interview pretest was conducted in summer 2024 with 21 participants aged 18 to 66, facilitated by the survey agency infas. The pretest was implemented in Arabic, German, and Russian, including individuals with and without migration backgrounds, as well as Ukrainian refugees and other refugees living in Germany.

The cognitive interview pretest results indicated that most participants understood the items and could provide answers as intended. However, Ukrainian refugees expressed uncertainties regarding time references, particularly concerning the values of societal and personal security, hedonism, and autonomy. Several participants noted that their personalities had changed since the onset of Russia’s war against Ukraine and their displacement,

leading them to ask interviewers which version of themselves they should refer to - pre-war or current - when answering. Comments such as “traditions do not matter at the moment as we live in a foreign culture” or “it is not clear which state is meant” also highlighted time- and place-related concerns. To clarify that the scale measures the current state, the word “now” was added to the introduction of the new HVS, which previously lacked this specification: “The following statements describe some people. Please indicate how much each person is or is not like you now”. This version of the introduction was also used in ESS Round 12. Further, translation annotations for the item “It is important to this person that the state is strong and can defend its citizens” clarify that “the state” refers to “the state of the country in which the respondent lives”.

Outlook

After pretesting the new Human Values Scale, it has become part of the ESS Round 12 and SOEP 2025 questionnaires. Once the data are available, further analyses on measurement invariance can be conducted to determine whether the new scale measures the same across different population groups. We recommend using the annotated ESS Round 12 source questionnaire along with the translations in the languages used in ESS Round 12, which will be made available on the ESS website in January 2026.

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Corresponding Author Contact Information

Elena Sommer esommer@diw.de

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