

Measuring Cross-Cultural Values: A Qualitative Approach

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Whereas theory posits that values influence consumer behavior, empirical research fails to establish a strong link between values and consumer behavior, particularly in cross-cultural contexts. We suggest that the major reasons for the apparent failure of predictive validity of cross-cultural values lie in the measurement issues concerning cross-cultural values. In this paper, we use the Chineseness values study as an example to review the values measurement issues and suggest a qualitative approach within a parallel emic framework for the study of cross-cultural values. It is expected that the new qualitative approach will contribute to better understanding, explanation, and prediction of the causal relationship between values and consumer behavior in different cultural contexts.

Field of Research: Marketing, Cross-Cultural Research, Values

1. Introduction

The importance of values is best summarized in the following statement of theory:

“Values are determinants of virtually all kinds of behavior that could be called social behavior – of social action, attitudes and ideology, evaluations, moral judgments and justifications of self and others, comparisons of self with others, presentations of self to others, and attempts to influence others. Boiling all these down to a more succinct theoretical statement, it can perhaps be stated that values are guides and determinants of social attitudes and ideologies on the one hand and of social behavior on the other.” (Rokeach 1973: 24)

The study of values originated in social sciences in the 1930's (e.g., Allport and Vernon 1931) but did not receive much attention in marketing until the late 1970's (e.g., Henry 1976; Howard 1977; Vinson, Scott and Lamont 1977). Comprehensive reviews arguing for the relevance of values to consumer behavior can be found in Pitts and Woodside (1984), and various special journal issues (e.g., *Psychology & Marketing* 1985; *Journal of Business Research* 1990, 1991).

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Despite general acceptance that values influence consumer behavior, research findings indicate that the strength of the relationship tends to be modest. One of the reasons for this weak relationship can be attributed to the measurement problems in values research (e.g., Reynolds and Jolly 1980; McCarty and Shrum 1997). Substantial doubts about the construct equivalence of values in cross-cultural contexts have also been raised recently.

Voronov and Singer (2002) question the conceptual and measurement validity of the most widely studied value, individualism-collectivism (I-C). Criticisms of the validity of I-C have also been made by Fiske (2002) and Kitayama (2002). More broadly, the validity of measurement of the entire system of Confucian or "Chinese" values, the value system most often contrasted with Western values, has been called into question in a study by McCullough, Tan and Wong (1986); the non-credible results obtained in this questionnaire study, in which Whites scored as highly as Chinese on measures of Confucian (Chinese) values, precipitates the quest for alternative more valid measures of Chinese values. The accurate measurement of consumers' values is crucial in the prediction of consumer behavior.

The major objective of this paper is to point out that as measured using present closed-end rating or ranking methods, values are disappointingly poor predictors of cross-cultural consumer behavior. They miss the real nature and nuances of values as held by people of different cultures. Realizing that many existing values inventories (e.g., Rokeach 1973) are predominantly Western- or U.S.-based, there are calls for the development of original emic (cultural-specific) values inventories from the Oriental or Chinese perspective (e.g., The Chinese Culture Connection 1987).

In this paper, we firstly give a brief overview of the major characteristics of values. We then review the major existing Chineseness values scales and suggest a qualitative parallel-emic approach to the measurement of values in cross-cultural contexts.

2. What are Values?

As defined by Rokeach (1973: 5), "A value is an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence." Smith and Schwartz (1997) review many definitions of values and identify five major features on which most theorists agree:

- (1) Values are beliefs. But they are not objective, cold ideas. Rather, when values are activated, they become infused with feeling;
- (2) Values refer to desirable goals (e.g., equality) and to the modes of conduct that promote these goals (e.g., fairness, helpfulness);
- (3) Values transcend specific actions and situations. Obedience, for example, is relevant at work or in school, in sports or in business, with family, friends or strangers;
- (4) Values serve as standards to guide the selection or evaluation of behavior, people, and events; and

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- (5) Values are ordered by importance relative to one another. The ordered set of values forms a system of value priorities. Cultures and individuals can be characterized by their systems of value priorities.

As a construct, values can be treated both as a dependent variable and as an independent variable. As a dependent variable, values are the consequences of cultural, societal, and personal antecedents that act upon an individual throughout his or her life time. As an independent variable, values are causally linked to behavior via mediating variables like attitudes and social norms (Rokeach 1973; Chan and Rossiter 1997).

However, problems in the measurement of values, particularly in cross-cultural contexts, have hindered advancement in values research. The major problems relate to the method of measuring values. In the following sections, we use the Chineseness values study as an example to review the values measurement issues and suggest a qualitative approach for the study of cross-cultural values.

3. Chineseness Values Studies

In the following, we review the major existing Chineseness values scales and discuss why these closed-end questionnaire studies are poor predictors of Chinese culture values.

3.1 The McCullough et al. (1986) Chineseness Study

The initial "Chineseness" study in consumer behavior originated in Singapore in 1982 as part of a study on family decision-making patterns. From a list of stereotypical Chinese belief statements generated by Chinese university students in Singapore, 10 items were selected by consensus in focus groups for measuring Chineseness (Tan and McCullough 1985; Ellis, McCullough, Wallendorf and Tan 1985; McCullough, Tan and Wong 1986). A 7-point agree-disagree Likert rating was used for each item. An additive index of Chineseness was compiled with the weights of each value item derived from a principal components factor analysis (Ellis et al. 1985).

This 10-item Chineseness scale (see Appendix 1) was administered to ethnically Chinese consumers in Singapore and ethnically White consumers in the United States (McCullough et al. 1986). Unexpectedly, results of this study concluded that ethnically White consumers living in the United States were as Chinese as ethnically Chinese consumers living in Singapore based on scores on the Chineseness scale.

Whereas the 10 "Chinese belief" statements were generated empirically, they were lacking a theoretical framework to justify their construct and content validities. The items were apparently not mutually exclusive, nor collectively exhaustive. We also suspect ambiguities about the underlying value(s) that each statement was supposedly representing. For example, while "Caring for one's aged parent is the duty of every person" obviously represents the "filial piety" Chinese value, there is no clear indication as to the underlying value(s) represented by the statement "A woman's place is in the home."

3.2 The Le Claire (1992) Chineseness Study

Drawing on the five universal value orientation dimensions classified by Kluckhohn and Strodtbeck (1961), Le Claire (1992) adopted eight of the 10 Chineseness scale items from the McCullough et al. (1986) scale and added three of his own items to come up with a new Chineseness scale with each of these 11 items classified as falling into one of the five Kluckhohn and Strodtbeck (1961) universal value orientation dimensions:

- (1) Human nature orientation: What is the character of innate human nature?
- (2) Man-nature orientation: What is the relation of man to nature (and supernature)?
- (3) Time orientation: What is the temporal focus of human life?
- (4) Activity orientation: What is the modality of human activity?
- (5) Relational orientation: What is the modality of man's relationship to other men?

A 7-point agree-disagree Likert rating was used for the 11 items, and a Chineseness score was compiled by unweighted averaging of the 11 items (see Appendix 2). Although the Le Claire (1992) Chineseness scale "looks" very similar to the original McCullough et al. (1986) Chineseness scale (8 of the 11 items in the Le Claire study are from the original Chineseness scale), they are fundamentally different in conception

The original McCullough et al. (1986) Chineseness scale was dimension-free; the items were not generated based on predetermined underlying value dimensions but rather to represent a single overall dimension of "Chineseness." After partitioning the original 10 items into the Kluckhohn and Strodtbeck framework, Le Claire dropped two redundant statements and added three other statements.

However, we contend that Le Claire's classification was not sufficient to represent Chineseness value dimensions. This became clear when we compared Le Claire's items with Yau's (1994) classification of Chinese cultural values in which he identified (sub)dimensions of Chinese values built on the same Kluckhohn and Strodtbeck (1961) framework.

3.3 The Yau (1994) Chinese Values Scale

Yau (1994) provided lengthy descriptions of 12 sub-dimensions of Chinese cultural values expanded from the five universal dimensions classified by Kluckhohn and Strodtbeck (1961). To operationalize the 12 sub-dimensions of Chinese cultural values (see Appendix 3), Yau collected 100 Chinese sayings (proverbs) from three sources and asked three Chinese academics in Hong Kong to judge them. If two or more judges agreed that a saying was relevant to at least one of the 12 sub-dimensions, that item was included in the questionnaire. This judgmental screening resulted in 66 candidate items. Through a pilot test, those 66 items were reduced to 45, of which Yau used 40 for the final scale (see Yau 1994).

However, whereas the Chinese sayings no doubt reflect Chinese cultural values, we contend that in many cases there are problems in identifying which underlying value sub-dimension each saying is reflecting, and the reverse problem that one saying

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may be reflecting multiple sub-dimensions. No factor-analytic proof of correspondence between sub-dimensions and items was put forward by Yau (1994).

3.4 The Chinese Culture Connection (1987) Chinese Value Survey

A major contribution to the empirical search for value dimensions was the seminal work by Hofstede (1980), where he found that countries could be classified along four dimensions: (1) Individualism-collectivism, (2) Masculinity-femininity, (3) Power distance, and (4) Uncertainty avoidance.

Suspecting that the Hofstede (1980) study might be biased towards western values, because it was derived from a questionnaire designed by various westerners, a group of scholars describing themselves as the Chinese Culture Connection (1987) published a survey instrument called the Chinese Value Survey (CVS). The items for this instrument were generated initially by several Chinese academics in Hong Kong and went through an iterative expert judgment process to generate 40 Chinese values items in Chinese (see English translations in Appendix 4). The items were rated by asking respondents to indicate on a 9-point scale how important each of the value items was to them personally, where a score of 1 meant "of no importance at all" and a score of 9 meant "of supreme importance." A factor analysis at individual level yielded four cultural value dimensions: (1) Integration, (2) Human-heartedness, (3) Confucian work dynamism, and (4) Moral discipline.

The following table shows the equivalence of factors obtained by the Chinese Culture Connection (1987) and by Hofstede (1980): (adapted from Smith and Bond 1993: 44)

<u>Chinese Culture Connection (1987)</u>	<u>Hofstede (1980)</u>
Integration	Collectivism
Human-heartedness	Masculinity
Confucian work dynamism	-----
Moral discipline	High power distance
-----	Uncertainty avoidance

Using measures with quite different cultural origins, these two studies generated complementary rather than contradictory results. The implications are: whereas power distance, individualism-collectivism and masculinity-femininity describe dimensions of variation in values which are relatively more culture-robust, uncertainty avoidance and Confucian work dynamism are less universally accessible values, though they may well still be important (Smith and Bond 1993). Hofstede himself accepts this conclusion and adds a fifth dimension in his 1991 book (Hofstede 1991); however, he prefers to call it Short-term -- Long-term orientation. He points out that all the Confucian values clustered together emphasize the virtue of taking a long-term perspective (Hofstede and Bond 1988, Hofstede 1991).

Whereas the 40 items in the Chinese Values Survey (CVS) were specifically generated from the Chinese culture, they are not theory-driven and may be missing or, conversely, over-representing some underlying Chinese cultural value dimensions.

4. Major Issues in the Cross-Cultural Measurement of Values

In cross-cultural values research, there are three major measurement issues: superficial measurement, multiple selves, and values hierarchy.

4.1 Superficial Measurement

The first issue is the superficiality of measurement of the complex constructs that are values. Typically, in values inventories, a single item is employed to measure each value (e.g., in the widely-used inventories by Rokeach 1973 and Kahle, Beatty and Homer 1986). It is wishful to believe that a complex attribute such as a value (Guanxi, or social interactions, being a typical example; see Fan 2002) can be adequately represented by a single-item measure. Whereas multi-item measures have been developed for the individualism-collectivism value, this has not been done for the many other values that appear in values inventories. The Schwartz (1994) values inventory does use multiple items per value but these are each single adjectives that, in our view, are not sufficient to capture either the complexity or the nuances of values, especially the way these values are mentally represented by people of different cultures. The various emic (cultural-specific) Chineseness values scales mentioned earlier also suffer from the same problem of superficial measurement.

4.2 Multiple Selves

The second issue concerns not the attribute of the construct of values, but the object of the construct, i.e., the self (Rossiter 2002). The problem is that the object of values, the self, is not necessarily stable. The idea of multiple selves is not new, beginning in psychology with William James (1890) and perhaps articulated best in a classic paper on "possible selves" by Markus and Nurius (1986). It is only recently, however, that varying self-referents have been suggested as an explanation for different, sometimes contradictory, expressions of values. The private self and the social self have been put forward as an explanation of the greater tendency toward "situationism" in East Asian cultures (Choi, Nisbett and Norenzayan 1999). Arnett (2002) has proposed that increasing globalisation via the media and travel has resulted in many young people in non-Western cultures developing a "bi-cultural" identity which increases the potential for value conflicts (and also conflicts in self-report measures of the importance of values). Burroughs and Rindfleisch (2002) demonstrate that even in Western cultures, materialist values conflict at the individual level with collectivist values.

4.3 Values Hierarchy

A third issue, somewhat related to situationism, is that values may not function on an equal level but may be hierarchical. For example, Chan and Rossiter (2003a) has proposed that the Confucian value of harmony is all-important in East Asian cultures and may explain why many East Asian individuals appear to be inconsistent in their expression of values when in fact what is happening is that they are varying their expressed views for the greater good of maintaining social harmony with various other individuals.

To address these measurement issues in cross-cultural values research, we advocate a qualitative approach to the measurement of cross-cultural values as discussed in the following section.

5. A Qualitative Approach to the Cross-Cultural Measurement of Values

“Cross-cultural implies at least two points of view: being ‘cultural’ requires a point of view similar to that of the emic, and ‘cross’ requires a perspective akin to the etic” (Berry 1980: 13). The terms “emic” and “etic” are derived from the two linguistic concepts of *phonemics* and *phonetics*. Phonemics focuses on sounds which are used in a single linguistic system, whereas phonetics focuses on the universal aspects of languages (Pike 1967). Applied in cross-cultural research, the emic approach holds that attitudinal or behavioral phenomena are expressed in a unique way in each culture. Taken to the extreme, no comparisons between cultures are possible.

The etic approach, on the other hand, is primarily concerned with identifying universals. When these universals are assumed and imposed on other cultural environments, they are referred to as “imposed etic” (Berry 1969) or “pseudo etic” (Triandis, Malpass and Davidson 1971).

The emic-etic dilemma in cross-cultural research is often referred to as a paradox. An emic approach in adapting measurements to each culture gives data with greater internal validity for each culture. However, this is at the expense of external validity, which makes cross-cultural comparisons difficult. By *assuming* culturally-comparable constructs, an etic approach may distort the meaning of constructs in some cultures or miss their cultural-specific aspects (Berry 1969; Church and Katigbak 1988).

Berry (1969, 1989) proposes a “parallel emic” approach that studies should be carried out in two or more cultures in parallel and once construct equivalence is achieved, cross-cultural comparisons can be derived. Concepts that appear in all cultures can be regarded as universal (a “derived etic”). Concepts that vary in different cultures can be confirmed as cultural specific (a true emic). Ongel and Smith (1994) review 25 years of articles published in the *Journal of Cross-Cultural Psychology* on the emic-etic distinction and find that 93% of the 635 articles are imposed etic, 6% are emic, and only less than 1% (seven studies) are derived etic.

The major difficulty by far is establishing construct equivalence, which includes conceptual, functional, translational, and measure equivalence as well as sample equivalence and data collection equivalence (Usunier and Lee 2005). A literature survey carried out by Jackson and Niblo (2003) indicates that the vast majority of published cross-cultural research is quantitative.

The predominant use of the imposed etic approach in cross-cultural research and the problems in establishing construct equivalence prompt researchers like Jackson and Niblo (2003) to call for the use of qualitative methodology within a parallel emic design in future cross-cultural research.

6. Qualitative Parallel Emic Approach

Chan and Rossiter (2003a) adopt a qualitative approach and a parallel emic framework in the study of cross-cultural values. They use ethnic interviewers to carry out in-depth interviews with respondents from the Australian and Chinese cultures and ask their opinions on selected emic Australian values and selected emic Chinese values. The questions are semi-structured but open-ended. Responses are subsequently coded into “deontological” (right, wrong) or “teleological” (good, bad outcome) “reasons” for holding each value. The respondents choose their preferred languages for the interviews. By carrying out emic enquiries in the respective cultures, this approach avoids the problems of conceptual, functional, and translation equivalence. The measure equivalence problem is avoided by the use of qualitative open-ended questions instead of quantitative rating or ranking scales. The use of a multi-item ethnicity scale (Chan and Rossiter 2003b) to screen different degrees of Australianness and Chineseness ethnicity and the use of ethnic interviewers and ethnic languages in the interviews avoid sample equivalence and data collection equivalence problems.

The qualitative approach in asking open-ended questions gives respondents and the interviewers opportunities to further elaborate their answers and questions so as to capture the multiple facets of the complex constructs which are values. Chan and Rossiter (2003a) demonstrate the investigation of the reasons why people hold certain values is best addressed via a qualitative approach which facilitates further probing in the interview process.

The major hindrances in the adoption of a qualitative approach to cross-cultural value research are the time and cost constraints in the interviewing process. This may in part explain the findings of Ongel and Smith (1994) which showed a strong preference for the “imposed etic” quantitative approach to the emic qualitative approach in cross-cultural research. However, the reliability and validity in the measurement of cross-cultural values should not be compromised for administrative convenience.

7. Conclusions

As pointed out by Rokeach (1973: 51):

“A major reason psychologists have paid more attention to the attitude than to the value concept is that more sophisticated methods have been available for measuring attitudes because of the efforts of such men as Bogardus, Thurstone, Likert, and Guttman. This greater availability of methods for measuring attitudes brings to mind Abraham Kaplan’s *law of the instrument*: ‘Give a small boy a hammer, and he will find that everything he encounters needs pounding’ (Kaplan 1964: 28). All such sophisticated research tools notwithstanding, theoretical considerations suggest that values are nevertheless more central than attitudes as determinants of human behavior.”

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The lack of proper measurement of values, particularly in cross-cultural contexts, has hindered the development of cross-cultural values research in the past. Using a theory-driven approach to the identification of core values in a culture and the use of a qualitative approach within a parallel emic design provides researchers with more valid methods to measure cross-cultural values. It is envisaged that this will lead to more conclusive research findings about the causal relationship between values and consumer behavior in different cultural contexts.

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Appendix 1: The McCullough et al. (1986) Chineseness Values Scale

1. A Woman's place is in the home. (Agreement).
2. Caring for one's aged parent is the duty of every person. (Agreement).
3. I often do the right things so as not to lose face. (Agreement).
4. I feel strongly about returning favors to others. (Agreement).
5. Every family should have a son. (Agreement).
6. My relationship with my parents is formalized. (Agreement).
7. I interact frequently and closely with my relatives. (Agreement).
8. Showing your affections openly is acceptable. (Disagreement).
9. Marriage should be a lifetime commitment. (Agreement).
10. One should not go to the extreme in one's behavior. (Agreement).

Source: McCullough, J., Tan, C.T. and Wong, J. 1986, 'Effects of stereotyping in cross cultural research: Are the Chinese really Chinese?' in Lutz, R.J. (ed.), *Advances in Consumer Research*, Vol. 13, Ann Arbor, MI: Association for Consumer Research, 576-578.

Appendix 2: The Le Claire (1992) Chineseness Values Scale

Man-to-nature

1. Marriage is a life-long commitment.
2. I am reluctant to complain about products that do not meet my expectation.

Man himself

3. Women should stay at home and take care of household duties.
4. My relationship with my parents is formalized.

Relational

5. When making important decisions, consideration of family comes first.
6. Not losing face is important.
7. I feel strongly about returning favors to others.

Time dimension

8. Every family should have a son.
9. If you have been my teacher for a day, I will treat you as my father forever.

Activity dimension

10. Showing affection openly is unacceptable.
11. One should not go to extremes in one's behavior.

Source: Le Claire, K.A. 1992, 'Ethnic attitudes and Hong Kong Chinese consumption values,' *Journal of International Consumer Marketing*, 4 (4), 73-87.

Appendix 3: The Yau (1994) Chinese Cultural Values Dimensions

Man-to-nature orientation

1. Harmony with nature
2. Yuan

Man-to-himself orientation

3. Abasement
4. Situation-orientation

Relational orientation

5. Respect for authority
6. Interdependence
7. Group-orientation
8. Face

Time orientation

9. Continuity
10. Past-time orientation

Personal-activity orientation

11. The doctrine of the mean
12. Harmony with others

Source: Yau, O.H.M. 1994, *Consumer Behaviour in China: Customer Satisfaction and Cultural Values*, London: Routledge.

Appendix 4: The Chinese Culture Connection (1987) Chinese Values Scale

1. Filial piety (Obedience to parents, respect for parents, honouring of ancestors, financial support of parents)
2. Industry (Working hard)
3. Tolerance of others
4. Harmony with others
5. Humbleness
6. Loyalty to superiors
7. Observation of rites and social rituals
8. Reciprocation of greetings, favours, and gifts
9. Kindness (Forgiveness, compassion)
10. Knowledge (Education)
11. Solidarity with others
12. Moderation, following the middle way
13. Self-cultivation
14. Ordering relationships by status and observing this order
15. Sense of righteousness
16. Benevolent authority
17. Non-competitiveness
18. Personal steadiness and stability
19. Resistance to corruption
20. Patriotism
21. Sincerity
22. Keeping oneself disinterested and pure
23. Thrift
24. Persistence
25. Patience
26. Repayment of both the good and the evil that another person has caused you
27. A sense of cultural superiority
28. Adaptability
29. Prudence (Carefulness)
30. Trustworthiness
31. Having a sense of shame
32. Courtesy
33. Contendedness with one's position in life
34. Being conservative
35. Protecting your "face"
36. A close, intimate friend
37. Chastity in women
38. Having few desires
39. Respect for tradition
40. Wealth

Source: The Chinese Culture Connection 1987, 'Chinese values and the search for culture-free dimensions of culture,' *Journal of Cross-Cultural Psychology*, 18 (2), 143-164.