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Research in Brief

Alternative Measurement Approaches to Consumer Values: The List of Values (LOV) and Values and Life Style (VALS)

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This article compares and contrasts two methods of measuring consumer values: the List of Values (LOV) and Values and Life Style (VALS). LOV apparently has some advantages: it is in the public domain and it relates more closely to consumer behavior.

For almost as long as values have been studied in consumer behavior, methodology has been of interest to researchers (e.g., Beatty et al. 1985; Reynolds and Jolly 1980; Vinson, Scott, and Lamont 1977). Clawson and Vinson (1978) imply that progress in methodological issues is crucial for understanding the relationship between consumer behavior and values. With this in mind, this article proposes to investigate two conceptually different ways of measuring values.

VALUES AND LIFE STYLE

One of the more intriguing developments in value methodology in recent years has been the Values and Life Style (VALS) methodology developed at SRI International by Mitchell (1983). It started from the theoretical base of Maslow's (1954) need hierarchy and the concept of social character (Riesman, Glazer, and Denney 1950). Approximately 34 questions[1] were identified through statistical and theoretical means as useful in classifying people into one of nine life style groups. These questions include various specific and general attitude statements and several demographic items. The life style groups in the United States include survivors (4 percent), sustainers (7 percent), belongers (35 percent), emulators (9 percent), achievers (22 percent), I-am-me (5 percent), experiential (7 percent), societally conscious (9 percent), and integrated (2 percent). A proprietary system of weighting questions for classification was developed using data from a national probability sample of 1,635 Americans and their spouses/mates (1,078) who responded to an SRI International mail survey in 1980. This study also included a number of questions about consumer behavior. Although many studies have apparently applied VALS methodology (Holman 1984), only the 1980 study results have been made public for quantitative inspection.

The impact of VALS has been widespread and dramatic. Although the proprietary scoring system has to date nearly precluded attention in scholarly and scientific circles (except Holman 1984; Mitchell 1983), the popular press has widely praised VALS (e.g., Atlas 1984; Dougherty 1981). Many companies have used VALS, such as AT&T (Veltri and Schiffman 1984). Among the many clients SRI International lists are the *New York Times, Penthouse,* Atlantic Richfield, Boeing Com-

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[1]The exact number of questions appears to be somewhat controversial. Holman (1984) reports 36 items and Mitchell (1983) reports 32 items. Our count of the items shows 33 actual items and one variable (hometown size) coded from zip code. The question on political party affiliation has two parts, and the second part is different for Independents than for Republicans and Democrats. Presumably Holman counted both branches of that question and the zip code question, and presumably Mitchell omitted each of these questions and one other in his count. Perhaps Mitchell's excluded item was father's education, since he did not report the data for that item.

mercial Airplane Co., American Motors, and Rainier National Bank.

Part of the lure of VALS comes from the vivid, perspicuous individual portraits that advocates paint of members of the various groups. Consider Holman's (1984) example of an emulator named "Chet." Chet seemed personable and dressed stylishly, yet the symbolism of his life always exceeded the reality. He owned a flashy car like one pictured in his bedroom, but the glamorous model pictured with the car eluded Chet's reality. Chet was clearly trying to prepare for success but lacked the savvy to attain it. Life had been fairly good to Chet, but it was often a bit too big for him to manage with competence. Because we all know a Chet, Holman's description of the emulator category seems compelling.

From the 1980 VALS survey (Mitchell 1983) we know the quantitative results of fewer than 90 questions, although Holman (1984) reports that over 800 questions were asked. That 90 includes the 30+ algorithm items (i.e., items used to classify people into VALS types). Thus, only about 60 reported items were criterion variables to be cross-tabulated with the VALS categories. Even assuming that all 90 reported differences in Mitchell (1983) were indeed statistically significant (no tests were reported), it should be remembered that with 800 items, 40 would be significant at the 0.05 level purely by chance, by normal random fluctuations in data. Thus, it is possible that some of these reported findings in Mitchell (1983) are less important than others. One way to identify robust differences is through replication.

LIST OF VALUES

One alternative to VALS is the List of Values (LOV), which was developed by researchers at the University of Michigan Survey Research Center (Kahle 1983; Veroff, Douvan, and Kulka 1981). LOV was developed from a theoretical base of Feather's (1975), Maslow's (1954), and Rokeach's (1973) work on values in order to assess adaptation to various roles through value fulfillment. It is tied most closely to social adaptation theory (Kahle 1983, 1984a). Subjects see a list of nine values, including self-respect, security, warm relationships with others, sense of accomplishment, self-fulfillment, sense of belonging, being well respected, fun and enjoyment in life, and excitement. These values can be used to classify people on Maslow's (1954) hierarchy, and they relate more closely to the values of life's major roles (i.e., marriage, parenting, work, leisure, daily consumption) than do the values in the Rokeach (1973) Value Survey (Beatty et al. 1985). In the LOV method, subjects have been asked to identify their two most important values (Kahle 1983; Veroff et al. 1981) or to rank the values (Beatty et al. 1984), as Rokeach (1973) prefers with his value survey. The values could also be evaluated through paired comparison (Reynolds and Jolly 1980) or rating (Munson 1984) approaches.

The major study of these LOV values was a face-to-face survey of a probability sample of 2,264 Americans conducted by the Survey Research Center in the Institute for Social Research at the University of Michigan. This study in part replicated and extended the data from the classic book, *Americans View Their Mental Health* (Gurin, Veroff, and Feld 1960); hence, LOV has been related to a number of important measures of mental health, well-being, and adaptation to society, roles, and self (Kahle 1983), as well as geographic dispersement (Kahle 1986). Many of the hundreds of findings from that research provide evidence of the validity of LOV. For example, people who value warm relationships with others have many friends, people who value fun and enjoyment in life consume a lot of alcohol, and people who value a sense of accomplishment have high incomes (Kahle 1983). Beatty et al. (1985) also found a significant number of predicted relationships between LOV and criterion variables. For example, people who value a sense of belonging especially like group activities. People who value fun and enjoyment in life especially like skiing, dancing, bicycling, backpacking, camping, and reading *Playboy*. People who value warm relationships with others give gifts for "no occasion." In two studies of test-retest reliability conducted by Beatty et al., 92 percent and 85 percent of those who picked any given first value ranked it first or second a month later. Readers wishing more detail on the development and properties of LOV should consult Kahle (1983, 1985).

VALS and LOV have several obvious similarities—for example, the VALS classification of achievers and the LOV classification of sense of accomplishment, or the VALS classification of belongers and the LOV classification of sense of belonging. In some instances the overlap seems logically unlikely, such as the VALS classification of societally conscious or the LOV classification of self-respect, because the groups are semantically quite different.

Both methods have identified an inner–outer distinction. In VALS the distinction is called outer-directed vs. inner-directed, but it derives from Riesman et al's (1950) concept of "other-directed" (Holman 1984). The outer-directed groups include achievers, emulators, and belongers, while the inner-directed groups include the societally conscious, experientials, and I-am-me. In the LOV research the distinction is between internal vs. external locus of control (Rotter 1966); the external values include sense of belonging, being well respected, and security, while the internal values include the rest. LOV theory also notes the importance of people in value fulfillment. Values can be fulfilled through interpersonal relationships (warm relationships with others, sense of belonging), personal factors (self-respect, being well respected, self-fulfillment), or apersonal things (sense of accomplishment, security, excitement, fun and enjoyment in life). (Although this discussion implies that a factor analysis would show two primary factors in LOV,

future research may show that factor structure is contextual).

Both techniques of measurement have been carefully considered within the context of life span developmental psychology. Whereas in VALS the individual is viewed as going from worse to better (e.g., integrated people are better than sustainers), within the LOV framework no such expectation exists. Mitchell describes the apparent anomaly in VALS of the oldest group being the lowest developmentally as the result of people who "slipped back" (1983, p. 47), whereas within the LOV framework maturation is not conceptualized in this manner. In LOV the identity of a "better" value is contextual, and it is believed that, for both LOV and VALS, identified age differences could be due to the obvious factor of age, but could also be due to development, history, biological influences, situational influences, cohort effects, or interactions of these factors.

The purpose of the present study is to compare and contrast the VALS and LOV methodologies (and by implication their underlying theories), venturing one primary hypothesis: LOV has greater predictive utility than does VALS in consumer behavior trends.

METHOD

Subjects

The subjects were 193 students enrolled at the University of Oregon. To optimize heterogeneity of variance within such a homogeneous group, we drew the primary sample (122) from foreign students who had at least 25 other citizens of their country also enrolled at the University. This limit was applied to ensure that the student at least had an opportunity for ongoing interaction with fellow representatives of his or her culture.[2] We also drew a sample of citizens of North America (70 U.S. citizens and 1 Canadian), again oversampling out-of-state students. Within these stratification parameters the sampling technique was a simple probability selection procedure. Because the purpose of this study is to compare and contrast measures within the sample, the exact definition of what is represented may be less crucial than in studies designed to estimate population parameters. Students who failed to reply to the initial mailing received a reminder telephone call the following week and a replacement questionnaire the week after that, resulting in a response rate of 52 percent. The final sample composition of foreign students was as follows: 72 East Asian students (Singapore = 24, Malaysia = 8, Thailand = 9, Hong Kong = 9, Taiwan = 5, Korea = 6, Japan = 11), 26 European students (Great Britain = 1, West Germany = 7, Norway = 18), and 14 others (Iran = 6, Saudi Arabia = 4, India = 2, Paraguay = 2).

[2]Mitchell (1983) reports that VALS has been applied internationally. One university admission requirement is a score of at least 500 on the Test of English as a Foreign Language (TOEFL), implying respondents have developed at least a minimal facility with English.

Materials

Subjects responded to the VALS algorithm items reported by Mitchell. We excluded the questions on political party identification, because a large percentage of respondents were not citizens of the United States. We excluded the question on occupation because all respondents were full-time students. We included a direct question on size of hometown residence area. Mitchell coded size of residence area from zip codes, but many of our respondents came from countries without zip codes. Finally, we modified the question on household income to personal income because pilot testing revealed that students found the wording of Mitchell's item confusing. That is, they were uncertain whether their household referred to their school or hometown household. In several instances where we replicated Mitchell exactly, we nevertheless failed to obtain responses in all response categories. For example, in our young sample no one answered the marital status question with *widowed.* Subjects ranked the nine LOV values as well, providing the other value measure. We included as criterion variables all items for which we had quantitative results (i.e., those included in Table A-2, p. 282 ff. from Mitchell's 1983 book, or in Hawkins, Best, and Coney's 1983 report of data supplied by SRI International) and that we judged relevant to a college population. Even in cases where Hawkins et al. but not Mitchell gave data, the wording of items always came from Mitchell; thus, all items were from SRI International surveys. By selecting measures reported as validating VALS, we provided a conservative test of our hypothesis about the greater predictive utility of LOV in consumer behavior trends.

RESULTS AND DISCUSSION

The percentage of our sample falling in each VALS category was as follows: survivors (3 percent), sustainers (8 percent), belongers (9 percent), emulators (5 percent), achievers (10 percent), I-am-me (58 percent), experiential (5 percent), and societally conscious (2 percent). Only three categories differed from Mitchell's national sample by more than 10 percent: belongers, I-am-me, and achievers. The shortage of belongers and achievers and the excess of I-am-me probably results primarily from the youth of this sample.

For LOV, Kahle (1983) collapsed fun and enjoyment in life with excitement because few people selected excitement. In the present study, we collapsed being well respected—also infrequently selected—with the other two. In the national study (Kahle 1983), being well respected was chosen especially by older people with little education, a profile rare in the current study. The following percentages of our present sample gave these values the highest rating: self-respect (17 percent), security (10 percent), warm relationships with others (17 percent), sense of accomplishment (12 percent), self-fulfillment (25 percent), sense of belonging (7 percent), and other (12 percent). As with VALS, three LOV cat-

TABLE

ACCOUNTING FOR ITEM RESPONSES BY VALS AND LOV

Item	VALS R^2	LOV R^2	Item	VALS R^2	LOV R^2
Financial security important	.017	.166	Major news (Time, Newsweek, etc.)	.021	.113
Believe industrial growth should be limited	.043	.281*	General sports (Sports Illustrated, Sports, etc.)	.066	.182
Feel most people are honest	.032	.168	Tabloids (National Enquirer, The Star, etc.)	.064	.099
Feel things are changing too fast	.048	.329*	Automotive (Car and Driver, Motor Trend, etc.)	.084*	.276*
Am conventional, not experimental	.052	.331*	Specific sports (Skiing, Tennis, etc.)	.036	.208*
TV is my main entertainment	.063	.227*	Domestic (Woman's Day, Family Circle, etc.)	.051	.131
Am a spender, not a saver	.130*	.392*	Men's magazine (Playboy, Penthouse, etc.)	.020	.146
Family is most important thing to me	.053	.117	Fashion (Mademoiselle, Vogue, etc.)	.034	.166
Would rather stay home than party	.075*	.267*	Commentary (New Republic, Co-Evolutionary Quarterly)	.058	.103
Feel have more self-confidence than others	.044	.180	Literary (Saturday Review, New Yorker, etc.)	.036	.083
Am a bit of a swinger	.026	.201	How frequently do you engage in the following:		
Agree social status is important	.061	.228*	Fresh or salt water fishing	.014	.147
I act on hunches	.022	.156	Golf	.013	.114
Agree too much is spent protecting environment	.042	.342*	Jogging	.091*	.156
Am rebelling against things in general	.057	.267*	Snow skiing	.070	.103
Agree energy crisis is real	.083*	.250*	Tennis	.043	.216*
Have good deal of confidence in elected officials	.023	.215*	Pop or rock concert	.085*	.230*
Believe quality of products is improving	.024	.114	Attend an X-rated movie	.014	.127
Believe products are getting safer	.036	.228*	Attend other movies	.081	.110
Believe labeling is getting better	.069	.251*	Attend opera, ballet, or other dance performance	.049	.132
Believe quality of service is improving	.059	.145	Visit art gallery or museums	.033	.217*
Believe companies' satisfying consumer complaints is improving	.029	.215*	Play video games in arcade or commercial establishments	.042	.142*
Believe consumer movement has increased prices	.065	.226*	Camera use:		
Have complained to store in past year	.024	.132	Instant	.052	.180
Believe federal government accurate source of energy information	.045	.211*	35 mm reflex	.010	.115
Believe public utilities accurate source of energy information	.043	.216*	Movie camera	.022	.106
Believe oil companies accurate source of energy information	.058	.235*	Frequency of use of:		
Frequency of watching TV show of following types:			Keep alert/stay alert aids	.038	.079
Morning news ("Today Show," "Good Morning America," etc.)	.036	.114	Contact lenses	.041	.128
Early evening news (5–7 p.m.)	.115*	.252*	Cold breakfast cereals	.082*	.200*
Late evening news (10 p.m. or later)	.048	.202*	Hot breakfast cereals	.033	.175
Mystery or crime dramas	.054	.211*	Breakfast/meal replacement bars or milk additions	.062	.201*
Comedies	.047	.184	Sugar-free carbonated soft drinks (sodas)	.033	.119
Variety	.073*	.268*	Caffeine-free carbonated soft drinks	.036	.077
Game shows	.058	.131	Other carbonated soft drinks (sodas)	.054	.131
Movies	.066	.287*	Mother's education	.078*	.444*
Talk shows	.042	.147*	Citizen of U.S.?	.113*	.555*
Sports programs	.070	.237	Length of residence in U.S.	.085*	.473*
Frequency of reading following types of magazines:					
Business (Business Week, Fortune, etc.)	.040	.163			

NOTE: * = $p \leq 0.05$.

egories deviated from the national sample by more than 10 percent: being well respected, security, and self-fulfillment. Security has a respondent profile demographically similar to being well respected and was probably underrepresented for the same reason. Self-fulfillment was selected with high frequency, as one might expect from a young, well-educated sample. Thus, the deviations of VALS and LOV from their respective national samples are quite similar and quite predictable given the nature of the sample here.

The Table displays the R^2 values that resulted from attempting to predict the criterion variables from the two systems for measuring values. VALS classification category, which is what VALS researchers typically employ in their data analyses, and LOV highest rated value were converted to dummy variables for the purposes of this analysis. The use of the nominalized highest LOV value rather than the full information available from the rankings probably decreases the power of the LOV items; however, it is necessary to attempt to make VALS

and LOV comparable. Because nearly everyone agrees that any social segmentation system ought to include demographics (e.g., Kahle 1984b; Yuspeh 1984), and because VALS but not LOV has demographics built in, the regression analyses for LOV also included demographic variables that are part of the VALS algorithm (age, education, marital status, ethnicity, conservatism, social class, and income).

The results imply that LOV significantly predicts consumer behavior trends more often than does the VALS scoring system (35 vs. 12). Independent of significance, the results also imply that the R^2 for LOV is larger than the R^2 for VALS a significant proportion of the time, $p < 0.001$. With a higher powered approach (e.g., larger N and ordinal or interval approach that LOV allows instead of VALS-required nominal approach), it is possible that a greater proportion of items would have attained significance.

CONCLUSIONS

The Table constitutes the primary test of the hypothesis that LOV has greater predictive utility than does VALS in consumer behavior trends. The evidence does not contradict that hypothesis. In fact, a pattern of LOV accounting for more variance in these consumer behaviors emerges. In a sense, the Table is also a test of the theoretical foundations of the two measurement approaches. That is, application of the two theoretical foundations is contrasted. One advantage of LOV is that one obtains the demographic predictions separately, which implies that a researcher can more readily identify the source of influence. Another obvious advantage of LOV over VALS is that it is simple to administer. Finally, it is easier to preserve the exact phrase from a value survey in an advertisement with LOV than with VALS, thus limiting the potential for mistaken communication as research passes through the marketing system.

Research on both LOV and VALS should continue. We are just beginning to unlock important knowledge on consumer values. Neither system here came even close to perfect prediction, implying that value research will not likely become the marketer's panacea. But both systems display some utility, and both systems improve on ignorance.

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