Measuring subjective well-being across OECD countries

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KEY MESSAGES

Thanks to the large investment of official data producers in OECD countries, measures of subjective well-being have become increasingly robust and meaningful from a policy perspective. In the ten years since the OECD published its *Guidelines on Measuring Subjective Well-being* (2013[1]), the inclusion of subjective well-being indicators in national measurement frameworks and household surveys has grown. Country practice has converged around a standard measure of life satisfaction, however affective and eudaimonic measures of subjective well-being remain less harmonised. This policy insights, along with its accompanying working paper (Mahoney, 2023[2]), identify priority areas for future OECD work by marrying the practical concerns of data collectors with good practice as identified by the academic literature.

Main findings of the brief include:

- **71%** of OECD member countries have established a **national multidimensional well-being initiative**, and **89%** of those **include a subjective well-being component**. Use of these data are primarily centred on reporting and monitoring subjective well-being trends, however some countries are beginning to use subjective well-being data for policy design and implementation.

- **Life satisfaction data are largely harmonised**, with 89% of countries collecting an indicator that aligns with *Guidelines* recommendations, and 82% doing so on at least an annual basis. Countries *do* collect data on the recommended affective states, although not always in line with OECD guidance; eudaimonic data collection remains infrequent, and less standardised.

- A review of advances in the subjective well-being literature shows that much of the *Guidelines* is still relevant, however research in some areas suggests gaps in coverage, or opportunities for improving take-up, that could be addressed in future work by:

  o revisiting **recommendations on affective indicators**, particularly in light of recent OECD recommendations on measuring population mental health;

  o reviewing progress towards **operationalising measures of eudaimonia**; and

  o creating new extended modules to **measure the subjective well-being of children**, and to further **develop more globally inclusive measures**, drawing on concepts of subjective well-being developed in Indigenous contexts and beyond western European/North American research literatures.

Measurement guidelines help to standardise data collection practices

The OECD's 2013 publication, *Guidelines on Measuring Subjective Well-being*, was the first of its kind to lay out clear recommendations for how to best measure the concept of subjective well-being in a standardised way, based on a rigorous review of the evidence base. The impetus for its creation stems in part from the recommendations made in the influential 2009 Stigliz, Sen, and Fitoussi *Commission on the Measurement of Economic Performance and Social Progress* report (Stiglitz, Sen and Fitoussi, 2009[3]), which made a clear case for the need to move beyond GDP, and emphasised the importance of measuring economic, environmental and social dimensions of well-being. The OECD's workstream on multidimensional well-being began soon after, with the development of a framework that, by considering various dimensions of people's well-being, addresses current living conditions and outcomes, inclusion, and resources for future generations (Box 1).

The OECD's well-being framework (Figure 1) guides the Organisation's monitoring and analysis of population well-being outcomes in OECD countries, and is also a useful tool to highlight gaps in the evidence base where more measurement work is needed. These gaps are usually analysed and addressed through thematic OECD measurement guidelines that the Organisation develops to improve the quality, consistency and international comparability of data on a given topic. By defining concepts, reviewing what is known in terms of the reliability and validity of existing measures, and discussing good practice for survey methods and design, *OECD measurement guidelines define global statistical standards for data producers and data users*. Given the growing relevance of the concept and increasing policy demand, subjective well-being was identified early on as a priority area for the development of new measurement standards.

Against that backdrop, the 2013 OECD *Guidelines on Measuring Subjective Well-being* aimed to address "**good mental states, including all of the various evaluations, positive and negative, that people make of their lives and the affective reactions of people to their experiences**." This definition distinguishes subjective well-being from overall well-being (Figure 1), as well as from perception-based and self-reported indicators more broadly. The *Guidelines* definition is operationalised by grouping the constituent parts into three overarching measurement concepts:

- *Life evaluation*: Evaluative measures of subjective well-being refer to the general assessments people make of their lives, most commonly captured through a life satisfaction indicator.
- *Affect*: Affective measures capture people's feelings, emotions or states, often measured with respect to a defined time period (e.g., "over the course of yesterday", etc.).
- *Eudaimonia*: Eudaimonia can be thought of as psychological flourishing, operationalised in the *Guidelines* as a measure of feeling one's life has purpose or meaning, though also containing aspects of autonomy, competence and self-actualisation.

The *Guidelines* were created to provide data producers with a better understanding of both *why* subjective measures of well-being are important and useful, and *how* to collect these data in a statistically reliable and valid way. The full report provides multiple modules with recommendations for the measurement of different aspects of subjective well-being, including extended modules on satisfaction with specific domains of life (such as job satisfaction), and experienced well-being questions for inclusion in time use surveys. However, the central recommendations of the *Guidelines* are distilled into the five items of the core module.

Although some national statistical offices were already active in the space of subjective well-being measurement when the 2013 *Guidelines* were drafted, many were not, and there was little harmonisation across the measurement approaches taken. Ten years on, this brief takes stock of current measurement practices across OECD member states, and whether or not subjective well-being indicators have begun entering policy conversations. In addition, the final section briefly overviews advances in the evidence

base, to see whether any of these changes have implications for the statistical quality of OECD recommended measures, or whether conceptual gaps in the core module can now be better addressed. This exercise results in a short-list of three priority areas for future OECD measurement work on subjective well-being.

Box 1. The OECD well-being framework guides both measurement practice and analytical work

First introduced in 2011, the OECD's well-being framework guides the organisation's work in monitoring trends, highlighting inequalities and examining the sustainability of well-being outcomes across OECD member states. The OECD takes a multidimensional approach to measuring well-being, with each of the eleven dimensions of current well-being entering into an individual's overall quality of life, while changes in the level of the four capital stocks reflect impacts on the well-being of future generations. The framework places an emphasis on the distribution of well-being outcomes, as opposed to simple averages, and highlights inequalities in outcomes across different population groups.

Figure 1. The OECD well-being framework
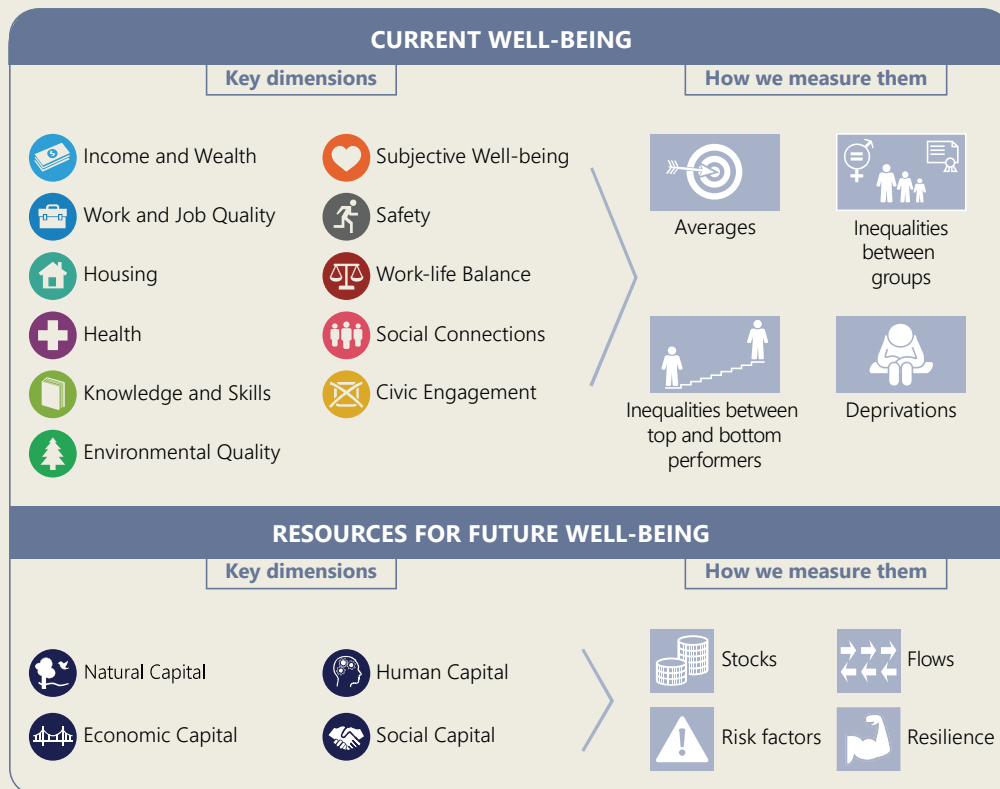
Source: (OECD, 2020[4]), *How's Life? 2020: Measuring Well-Being*, OECD Publishing, Paris, https://dx.doi.org/10.1787/9870c393-en.

Subjective well-being is a stand-alone dimension of well-being in the OECD framework. However, additional concepts that are tangential, but related, to subjective well-being outcomes are included in other dimensions. For example, the health dimension includes mental health; the social connections dimension covers loneliness; and social exclusion is covered in social capital. Whilst some measurement instruments blend these concepts together in a way that makes them indistinguishable, the definition adopted in the 2013 *OECD Guidelines on Measuring Subjective Well-being* aimed to maintain a clear distinction between it and other domains featured in the OECD framework.


Why collect subjective well-being data? Examples of policy uptake

Over the past two decades, more than 70% of OECD member states have developed their own, national multidimensional well-being initiatives: a mix of measurement frameworks and dashboards, well-being focused surveys and strategic development plans. The vast majority of frameworks include objective indicators relating to health and material conditions (such as income, work and housing), **but 89% of the 27 OECD countries with a current national multidimensional well-being initiative also include at least one measure of subjective well-being** (Figure 2). A life evaluation indicator – almost always in the form of a life satisfaction question – is the most common at 85%, followed by affect (56%) and eudaimonia (33%).

Many OECD governments have thus begun collecting subjective well-being data as an informative tool. Currently country use of subjective well-being data is primarily centred on reporting and monitoring levels, trends and inequalities, and holding the legislature accountable. While not extensively common, there are examples of countries using these data for policy design and implementation.

Figure 2. Almost 90% of countries include some form of subjective well-being indicator in their national well-being approaches, the most common of which is a life evaluation question

The share of national well-being initiatives that include subjective well-being indicators, by type
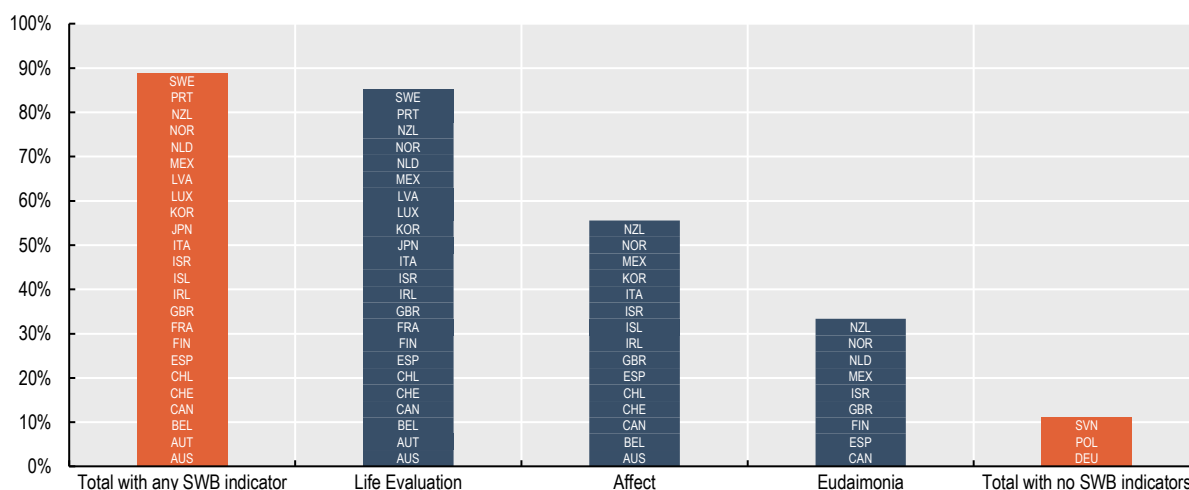
Note: Only current national well-being approaches are considered.
Source: Mahoney, J. (2023[2]), "Subjective well-being measurement: Current practice and new frontiers", *OECD Papers on Well-being and Inequalities*, No. 17, OECD Publishing, Paris, https://doi.org/10.1787/4e180f51-en.

As one example of policy application, the United Kingdom has set the improvement of subjective well-being as an explicit policy goal in the context of its (2022) *Levelling Up* White Paper (HM Government, 2022[5]). This outlines a cross-government strategy to level the playing field across subnational regions in the United Kingdom by providing equal opportunities for all people, regardless of who they are and where they live. This goal is to be achieved through 12 over-arching missions, one of which (mission 8) is to improve well-being. Progress of the mission is monitored by tracking all of the Office for National Statistics four subjective well-being measures (the ONS 4) – covering evaluative, affective and eudaimonic aspects of subjective well-being.

The United Kingdom and New Zealand have both developed guidance for government officials on the use of subjective well-being data in policy appraisal and evaluation. HM Treasury in the United Kingdom has published the *Green Book*, technical guidelines on policy appraisal, which includes in-depth descriptions

for how to use life satisfaction data in cost-benefit (CBA) and cost-effectiveness (CEA) analyses to complement traditional CBA valuation techniques (HM Treasury, 2022[6]). In New Zealand, the Treasury has developed a standardised approach to support CBA across government departments and agencies, known as the CBAx Impacts Database, and an accompanying guidance document. The database enables civil servants to work off the same assumptions when monetising policy impacts through CBA, and includes values derived through a variety of methods, including some subjective well-being valuations.

Policy interest in multidimensional well-being in general has been growing in recent years. Countries with newly established initiatives – such Ireland and Japan – have expressed interest in building multidimensional well-being data into policy via budgeting processes or through the development of key performance indicators. Yet when subjective well-being data do enter the policy decision-making arena in specific use cases, it is almost always in the form of a life satisfaction indicator. There seems to be less clear consensus among policy makers as to whether and how to use affect data, and these preliminary findings suggest limited direct policy use of eudaimonia in the context of applying national well-being initiatives to budgeting, performance monitoring, or policy design, appraisal and evaluation. Improving the availability and international comparability of these indicators may encourage more research into their applications, which could incentivise more use in future.

Taking stock of current measurement practice across the OECD

The *Guidelines* is a rich publication containing a number of recommendations and best practices for survey methodologies, along with a series of extended question modules for each of the three domains of subjective well-being: life evaluation, affect and eudaimonia. The main recommendations from the publication are distilled into the five questions included in the core module (Figure 3) – with the goal of providing a very short set of measures for general use by National Statistical Offices in their household surveys. The working paper accompanying this policy insight outlines the results of a stock-taking exercise conducted by the OECD, to unpack the specific characteristics of the indicators countries are using to measure different aspects of subjective well-being, to see how closely aligned they are with *Guidelines* recommendations and how standardised data collection practice is across member states.
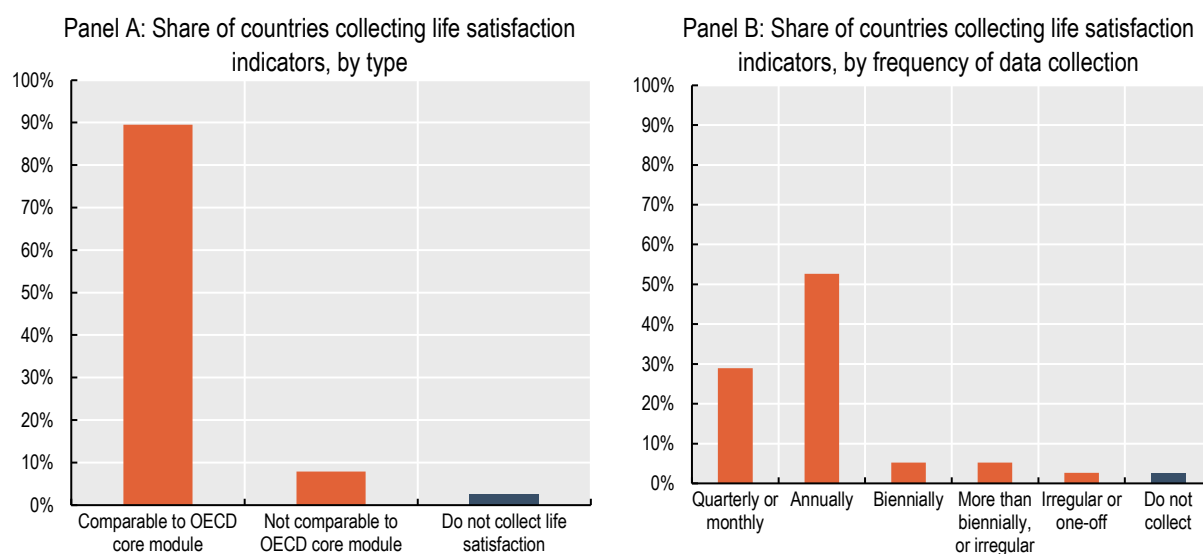
Figure 3. The core module from the Guidelines contains five questions

Source: OECD (2013[1]), *OECD Guidelines on Measuring Subjective Well-being*, OECD Publishing, Paris, https://doi.org/10.1787/9789264191655-en.

Results from this exercise show that harmonised data on life satisfaction, collected with regular frequency, are now available for the majority of OECD countries. All OECD countries but one collect data on life satisfaction, and close to 90% do so in ways that are highly comparable to the indicator recommended in the *Guidelines* core module (Figure 4, Panel A). Comparability is assessed on question phrasing, answer scale and response formats used. Beyond the progress made in indicator harmonisation, another important development over the past decade has been the increased frequency with which life satisfaction data are collected. Over 80% of OECD countries collect these data annually, or more frequently – a significant improvement relative to when the original *Guidelines* were written (Figure 4, Panel B).

Figure 4. Just under 90% of OECD member countries collect harmonised life satisfaction data, and more than three-quarters do so annually or more frequently

Panel A: Share of countries collecting life satisfaction indicators, by type

Panel B: Share of countries collecting life satisfaction indicators, by frequency of data collection

Note: "Comparable to OECD core module" means the life satisfaction measure has similar question phrasing and uses a 0-10 answer scale. For countries that collect multiple types of life satisfaction indicators, only the one most comparable to the OECD guidelines is considered. Source: Mahoney, J. (2023[2]), "Subjective well-being measurement: Current practice and new frontiers", *OECD Papers on Well-being and Inequalities*, No. 17, OECD Publishing, Paris, https://doi.org/10.1787/4e180f51-en.

Country practice in measuring affect is less harmonised, and there has been less take-up of the *Guidelines* recommended indicators. In particular, the *Guidelines'* focus on short-term affective states, sometimes referred to as "experienced well-being", contrasts with practice in several countries that have adopted measures focused on the more persistent symptoms captured in mental health measurement tools that aim to assess risk of anxiety and depression. This is not to say that OECD countries are not including similar items (e.g. happy, worried, depressed) to those covered in the *Guidelines*: they are, but are largely doing so in a format that diverges from the OECD recommendations, and in ways that aim to capture remembered symptoms of mental ill-health, rather than yielding information about experienced well-being.

All OECD countries collect data on feeling worried, nervous, anxious (Figure 5, Panel B); and almost all collect data on feeling depressed, sad, unhappy or downhearted (97%, see Figure 5, Panel C); or feeling happy or cheerful (95%, see Figure 5, Panel A). The influence of mental health screening tools is particularly apparent when looking at response scales and recall periods. The *Guidelines* recommendation to use a 0-10 scale is less commonly adopted than are 4- or 5-point Likert scales; the latter of which are almost always used in the mental health survey items. Similarly, most mental health tools employ a recall period of the past two to four weeks, as opposed to the OECD recommendation of "yesterday". Rather than prioritising more accurate recall of short-term affective states, mental health screening tools are designed to identify those at risk for mental health conditions, meaning that capturing information on the

persistence of symptoms over a longer time frame is of central importance. Whilst both approaches include similar-looking items, the different answer scales and recall periods of mental health screeners and the "*yesterday*" framing in the *Guidelines* means that they are targeting different underlying constructs, and are subject to different sources of measurement error.

Figure 5. Countries are collecting data on affect items recommended in the core module, but with a range of different formats and tools

Share of OECD countries collecting each type of affect item, by type of survey tool used
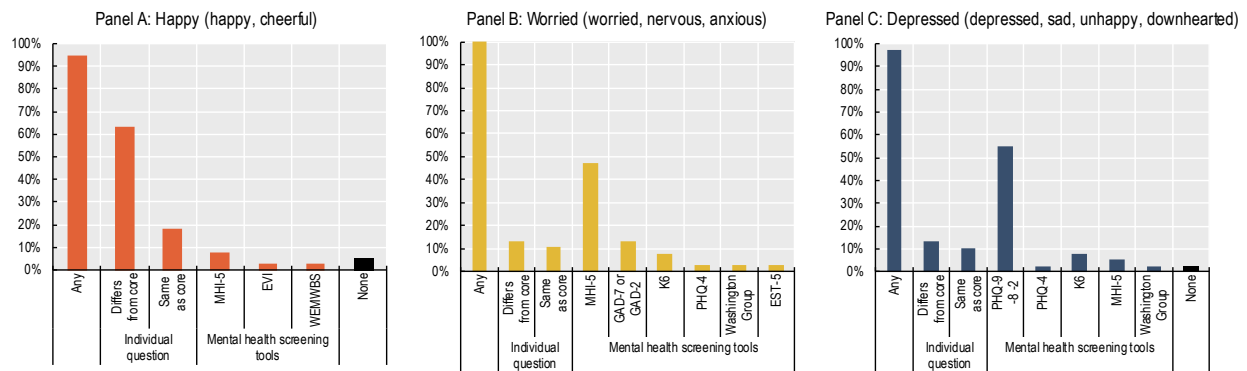
Note: Most countries capture each concept – happiness, worry, depression – through a variety of different question formats and screening tools. These figures show the indicator that is collected most frequently, per country.
Source: Mahoney, J. (2023[2]), "Subjective well-being measurement: Current practice and new frontiers", *OECD Papers on Well-being and Inequalities*, No. 17, OECD Publishing, Paris, https://doi.org/10.1787/4e180f51-en.

Findings on collection of data capturing a sense of meaning or purpose show the lowest degree of harmonisation. While 80% of OECD countries have at some point collected data on feeling that life is meaningful, worthwhile or useful, these data collection efforts are often irregular, or have since been discontinued, and only six countries are regularly collecting the OECD *Guidelines* recommended eudaimonia measure.

The general lack of harmonisation across countries is perhaps in part due to the lack of conceptual clarity on what precisely eudaimonia is, as well as a lack of consensus on how to capture it in a very short set of survey questions. Eudaimonia is an umbrella term that hosts many concepts. The original *Guidelines* defined eudaimonia as "a sense of meaning and purpose in life, or good psychological functioning": a description that leaves room for alternate measurement approaches. And indeed OECD countries are active in collecting data on concepts that fall under this broader definition: over one-fifth of countries collect data relating to hope and optimism; self-determination; ability to cope; and self-esteem. Furthermore, concepts of meaning, autonomy, self-esteem and optimism often appear in mental health modules – especially those with a focus on positive mental health – all of which have seen growing interest and uptake in recent years. This suggests the time may be right to re-engage official data producers in conversations about how best to field eudaimonic concepts in household surveys, where space is limited and defining the shortest possible set of questions is of paramount importance.

The high take-up of the OECD recommendations on life satisfaction means there would be a high cost (to both harmonisation and time series) and a much lower potential gain associated with changing the recommendations in this domain. By contrast, findings from affect and eudaimonia measurement suggest that future efforts by the OECD to clarify, reinforce or rework recommendations for these indicators would perhaps be more pertinent.

New frontiers of subjective well-being measurement

After reviewing advances in the academic and grey literature that have been published over the past ten years, the working paper identifies three broad priorities for future OECD work: revisiting affective measures, reconceptualising eudaimonia, and developing experimental modules on child subjective well-being outcomes and globally inclusive approaches to measurement (Table 1). Future work will be driven by four important criteria, which are general standards when engaging in policy-relevant statistical revisions:

- *Consistency:* There is significant value in having generally agreed-upon statistical standards, and little value – indeed potential harm – in making marginal but disruptive adjustments. Changes should only be made if there is compelling evidence that the benefits of doing so significantly outweigh the costs.
- *Brevity:* Space for new questions on existing surveys comes at a high premium. A standardised core module will only be adopted in full by national statistical offices if it is kept extremely brief.
- *Value-add:* Any newly added indicator should be policy relevant, and should have predictive power beyond that of existing measures.
- *Global inclusivity:* Concepts included in international measurement recommendations should have meaning for all population groups, in all countries, and any evidence suggesting certain concepts are tailored to one population group over another would be grounds for reconsideration.

Table 1. Focal areas for future OECD measurement work on subjective well-being

Topic	Description
Refine measurement of affective indicators (Core and extended modules)	Review latest evidence on: • answer scales and recall period, • developments in experienced well-being measurement, • important concepts missing, • global inclusivity of question framing, • how existing and potential affect items perform in practice (psychometric properties; validity; policy signals/relevance; value-add relative to other subjective well-being measures)
Seeking the most meaningful measures of eudaimonia (Core and extended modules)	Review latest evidence on: • important concepts missing (e.g. hope or optimism, components of self-determination theory), • global inclusivity of question framing, • how existing and potential eudaimonia items perform in practice
Extended and experimental modules	New modules on: • Subjective well-being measures for children and young people • More globally inclusive concepts and measures, beyond adaptations to the core module

Source: Mahoney, J. (2023[2]), "Subjective well-being measurement: Current practice and new frontiers", *OECD Papers on Well-being and Inequalities*, No. 17, OECD Publishing, Paris, https://doi.org/10.1787/4e180f51-en.

Refine measurement of affective indicators

The findings from current country practice show that there is a lack of harmonisation around the collection of data on affective states, suggesting that the core module recommendations may not be working as best as they could, and might benefit from further review. One approach is to consider a wider range of affective states to measure, for example by including low arousal positive affect measures such as feeling calm or at peace. Other research highlights the importance, and value add, of measuring love or physical pain. Another consideration of affect measures is the time dimension, or recall period. The time dimension is particularly relevant for affect in distinguishing between experienced well-being on the one hand, and symptoms of mental ill-health on the other: experienced well-being is the measurement of affective states *as they are being experienced in the moment* (or as close to it as possible), whereas questions addressing

the symptoms of mental ill-health are typically captured over much longer timeframes. The lack of country take-up of *Guidelines* recommended affect measures in general household surveys, and the more widespread use of mental health derived tools, suggest that experienced well-being measures may be of greatest value to policy makers when integrated in time use surveys; and furthermore, that advances in digital sampling techniques and smartphone apps have made gold-standard measures for experienced well-being measures more cost effective for data producers, including NSOs. Future OECD work could explore more explicit time use survey recommendations.

Seeking the most meaningful measures of eudaimonia

In the original *Guidelines*, the concept of eudaimonia was more loosely defined as compared to the other two domains, and its precise definition is not universally agreed upon in the literature. Given the relative lack of take-up of the *Guidelines* recommended indicator, it may be worth considering whether a different measure, or short set of cohesive measures, could better encompass the full meaning(s) of eudaimonia. One potential avenue for exploration are measures of hope and/or optimism. Hope is associated with better physical health outcomes, and a greater likelihood to invest in one's life, while a lack of hope leads to worse labour market, educational and marital outcomes, and a higher likelihood of incarceration; new research has also found strong links between hope and voting behaviour. Another path is to delve into self-determination theory. Many OECD member countries are collecting data on concepts relating to autonomy and competence which, along with relatedness, comprise the necessary inputs for human wellness as described by self-determination theory. Evidence has shown its importance in a variety of contexts, for example in improving outcomes in healthcare settings, and research has illustrated how the three components of self-determination theory are requirements for psychological well-being across different countries and cultural contexts, even when controlling for socio-demographic factors. Simultaneously, future efforts can seek to better understand why official data producers have thus far been reluctant to measure meaning and purpose, and whether more evidence as to the policy-relevance of this measure might encourage greater use in future.

New extended or experimental modules

The *Guidelines* included not just a core module, but also extended modules on a variety of topics – for example, domain evaluation measures (i.e. how satisfied one is with various aspects of one's life), or experienced well-being. Therefore beyond considerations for how the core might be re-examined, there may also be scope to revisit the extended modules, or to develop modules in new areas of importance.

Extended module for specific populations: Children and young people

Improving the well-being of children and young people aged 0 to 17 is a high-profile policy goal in many OECD countries: more than half have an integrated policy plan to promote child well-being and three-quarters have a national youth strategy. Yet despite the general recognition of the importance of children's well-being, and substantial investment in improving measurement practice across member states (Box 2), large measurement gaps remain. OECD work on child well-being data and measurement has identified focal areas for future research that include better and age-appropriate measures for social and emotional well-being, and instruments that capture the perspectives of children themselves – rather than evaluations from their caretakers – including better measures of children's appraisal of satisfaction in different life domains, sense of self-realisation and perception of their future. Advances in natural language processing using artificial intelligence may enable data collectors to process and analyse free form answers to survey prompts, opening new ways of collecting social and emotional well-being information from young children. OECD work has also emphasised the need to better capture the time dimension and attitudes towards the future reflected by the notion of child *well-becoming*, as well as to better grasp the emotional and social components of children's sense of belonging, connectedness and meaning of life. An important challenge

is also to better grasp how cultural factors and other childhood experiences may affect responses to well-being surveys, and potentially impact findings from international comparisons at the population level.

Box 2. Child well-being data at the OECD

The OECD WISE Centre has a significant workstream devoted to child well-being data and measurement, including the OECD Child Well-being Data Portal and the accompanying Child Well-being Dashboard. The Data Portal contains over 200 comparative measures on child well-being outcomes, the drivers of these outcomes, and child-relevant public policies. The Portal includes data on social, emotional and cultural outcomes, which encompass topics relating to safety, emotional security, and basic emotional needs (i.e., support from family); socio-emotional skills; mental health outcomes including diagnosed conditions; and subjective well-being outcomes including affective states, life satisfaction and a sense of meaning in life. While some of these outcomes are available for a wider age range, notably outcomes relating to mental health diagnoses and family support (and to a lesser extent, some affective states), the subjective well-being indicators are primarily taken from the OECD's PISA survey. This means that the questions are fielded to 15-year-olds, and thus provide information on social and emotional outcomes for adolescents but not for younger children.

Sources: OECD (n.d.), Child Well-being Outcomes (database), https://www.oecd.org/els/family/child-well-being/data/outcomes/ (accessed on 12 May 2023); OECD (n.d.), *OECD Child Well-being Dashboard*, https://www.oecd.org/els/family/child-well-being/data/dashboard/ (accessed on 27 April 2023).

Experimental module on new approaches: More globally inclusive measures

The goal of the core module of the *Guidelines* is to succinctly capture the important outcomes that matter for people's subjective well-being. The five questions were crafted with the aim of being relevant for all populations, and while OECD research suggests measures of life satisfaction and affect are robust across cultural contexts, it is worth considering how globally inclusive the full set of measures truly are: or whether there are additional concepts that should be considered for measurement. Much of the literature on subjective well-being measurement is based on evidence from a relatively small – and from a global perspective, non-representative – population: what has been termed Western, educated, industrialised, rich and democratic. If the evidence base is skewed towards one population type, it follows that recommendations based on that evidence may also be similarly skewed, or missing concepts that have real importance for other population groups. Beyond academics, national statistical offices and governments have developed measurement frameworks for specific population groups, including Indigenous measurement approaches, which prioritise new outcomes of subjective well-being.

THE WAY FORWARD

Over the next two years the WISE Centre will invest in developing an expanded and updated version of the *Guidelines on Measuring Subjective Well-being* that will focus on the following:

- **Refining affective measurement** by reviewing the scope of affective states to be measured, analysing developments in experienced well-being measurement and more clearly delineating between those and measures of mental health.
- Seeking more **meaningful measurement of eudaimonia** to possibly move beyond a single recommended indicator on whether one's life has meaning or a sense of worth; other potential avenues to explore include measures of hope, or the components of self-determination theory (autonomy, competence and/or relatedness).
- Creating new **extended and experimental modules** on important topics for which there is high demand among official data producers, including: (1) developing an experimental module on **child subjective well-being** measurement, and (2) establishing an experimental module highlighting more **globally inclusive** subjective well-being measurement approaches.

The past decade has seen significant progress not only in the creation of high-quality subjective well-being data, but in their use in policy. The next ten years will no doubt yield new insights, and hopefully, will continue the progression towards building policy on what matters most for people's well-being.

Resources

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