

**CENTRO ITALO-TEDESCO**



**DEUTSCH-ITALIENISCHES  
ZENTRUM**

**VILLA VIGONI**

**Social Reporting in Europe 2012:**

***Subjective Indicators: Usefulness and Information***

***Potential for Policy Making***

**April 25-27, 2012**

# MEASURING WELLBEING IN ITALY: “SUBJECTIVE ASPECTS” IN THE BES PROJECT

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**THIS PRESENTATION HAS BEEN AGREED  
WITH**

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Member of the Scientific Committee on Measuring Wellbeing  
established at the Italian National Institute of Statistics (ISTAT)



# Shared idea:

In order to define new indicators of national progress and wellbeing we need



**civil society**



defining concepts and domains

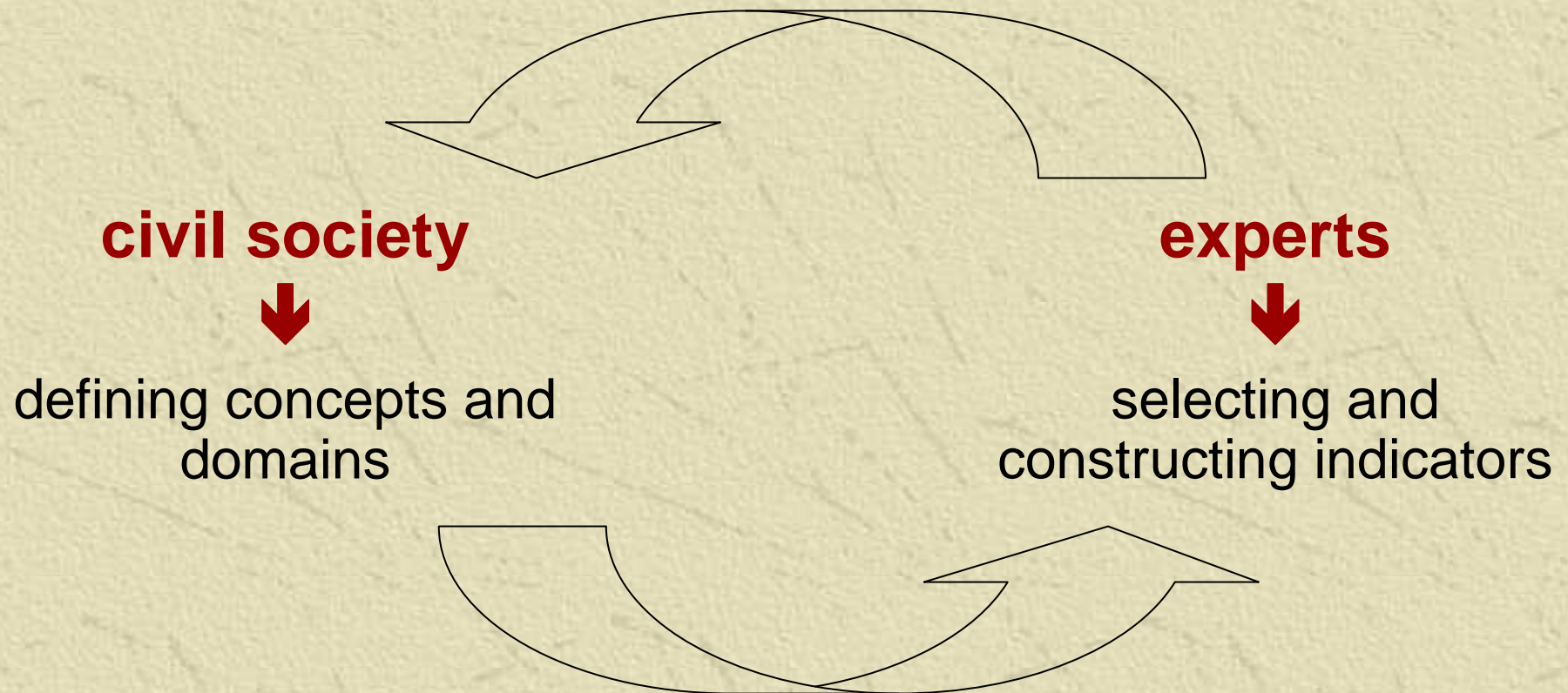
**experts**



selecting and constructing indicators

# Shared idea:

In order to define new indicators of national progress and wellbeing we need



What is going on in Italy concerning the definition of new indicators of progress and wellbeing?

## The **BES** project

**B**enessere **E**quo e **S**ostenibile

**BES** is a joint initiative of

**CNEL** (National Council for Economics and Labour)

and

**ISTAT** (Italian National Institute of Statistics)

<http://www.misuredelbenessere.it/>

What is going on in Italy concerning the definition of new indicators of progress and wellbeing?

## The **BES** project

**B**enessere **E**quo e **S**ostenibile

**BES** is a joint initiative

- aimed at identifying new indicators for measuring the progress of the country
- through a particular process able to involve unions and management, civil society and academic experts
- by considering concepts not only related just to [macro-]economics but also to equity and sustainability with reference to social and environmental dimensions

What is going on in Italy concerning the definition of new indicators of progress and wellbeing?

## The **BES** project

**B**enessere **E**quo e **S**ostenibile

Institutional referent



The **Italian Parliament**



# The **BES** project

**B**enessere **E**quo e **S**ostenibile

## Two committees

### **Steering Committee**

CNEL & ISTAT



unions and management, civil society,  
...

### **Scientific Committee**

ISTAT



ISTAT researchers and academics  
professors

April 2011 – December 2012

May 2011 – December 2012

# The **BES** project

**B**enessere **E**quo e **S**ostenibile

## Two committees

### **Steering Committee**

CNEL & ISTAT



defining domains

### **Scientific Committee**

ISTAT



selecting indicators

↳ sub-committees ...

Sub-committee on  
"Subjective Wellbeing"

Coordinator:

Filomena Maggino

Components:

Enrica Aureli, Leonardo Becchetti, Elena Giachin, Marco Malgarini,  
Silvia Montecolle, Sante Orsini, Luciana Quattrociochi

**Sub-committee's task:**

- selecting subjective wellbeing indicators
- monitoring subjective indicators of the other sub-committees

Here, the  
**conceptual process**  
adopted by the sub-committee in  
order to select indicators  
**is illustrated.**

# Path leading to definition of wellbeing and progress indicators

(a) conceptual model

↳ (b) explanatory model

↳ (c) domains

↳ (d) indicators

↳ (e) synthesis

A conceptual clarification:  
*subjective dimensions*

**Traditional definition:**

- **abilities**
- **personality traits**
- **sentiments**

# A conceptual clarification: *subjective dimensions*

|                               |                          |  |  |
|-------------------------------|--------------------------|--|--|
| <b>ABILITIES / CAPACITIES</b> | intellectual             | <ul style="list-style-type: none"> <li>- verbal comprehension and fluency</li> <li>- numerical facility</li> <li>- reasoning (deductive and inductive)</li> <li>- ability to seeing relationships</li> </ul> | <ul style="list-style-type: none"> <li>- memory (rote, visual, meaningful, etc.)</li> <li>- special orientation</li> <li>- perceptual speed</li> </ul> |
|                               | special                  | <ul style="list-style-type: none"> <li>- mechanical skills</li> <li>- artistic pursuits</li> </ul>   | <ul style="list-style-type: none"> <li>- physical adroitness</li> </ul>  |
| <b>PERSONALITY TRAITS</b>     |                          | <ul style="list-style-type: none"> <li>- social traits</li> <li>- motives</li> <li>- personal conceptions</li> </ul>   | <ul style="list-style-type: none"> <li>- adjustment</li> <li>- personality dynamics</li> </ul>   |
| <b>SENTIMENTS</b>             | interests and preference |  |  |
|                               | values                   |  |  |
|                               | attitudes                | cognitive → evaluations (beliefs, evaluations opinions)  |  |
|                               |                          | affective → perceptions (emotional states)   |  |
| behavioural intentions        |                          |  |  |

**(a) Conceptual model**



(a) conceptual model

concepts to measure and  
monitor and  
their conceptual dimensions

⇒ (b) explanatory model

⇒ (c) domains

⇒ (d) indicators

⇒ (e) synthesis

(a) Conceptual model

**BES** → Benessere Equo e Sostenibile

quality of life

equity

sustainability



## (a) Conceptual model

Three concepts



necessity to decline them at

- micro and macro level,
- internal and external level

## (a) Conceptual model

### Quality of Life

- **LIVING CONDITIONS**
- **SUBJECTIVE WELLBEING**

## (a) Conceptual model

### Quality of Life

#### LIVING CONDITIONS

- a. Objective aspects (outcomes, resources and capabilities, external circumstances)
- b. Subjective evaluation of living conditions

## (a) Conceptual model

### Quality of Life

## SUBJECTIVE WELLBEING

### a. Cognitive dimension

- satisfaction with life as a whole
- satisfaction with life in each ambit/domain

## (a) Conceptual model

### Quality of Life

## SUBJECTIVE WELLBEING

### b. Affective dimension

- positive affects
- negative affects
- affects related to particular activities, situations, ...

## (a) Conceptual model

**Equity**

Distribution of wellbeing in population



economic and social cohesion



## (a) Conceptual model

# Equity

### Subjective aspects

- internal equity (e.g., importance of one's own life's ambitions)
- perceived equity (→ *comparison approach*)
- ...

## (a) Conceptual model

### Sustainability

Possible erosion or permanence of conditions (→ capitals) for

- present population and future generations (external level)
- present and future individual lives (internal level)

## (a) Conceptual model

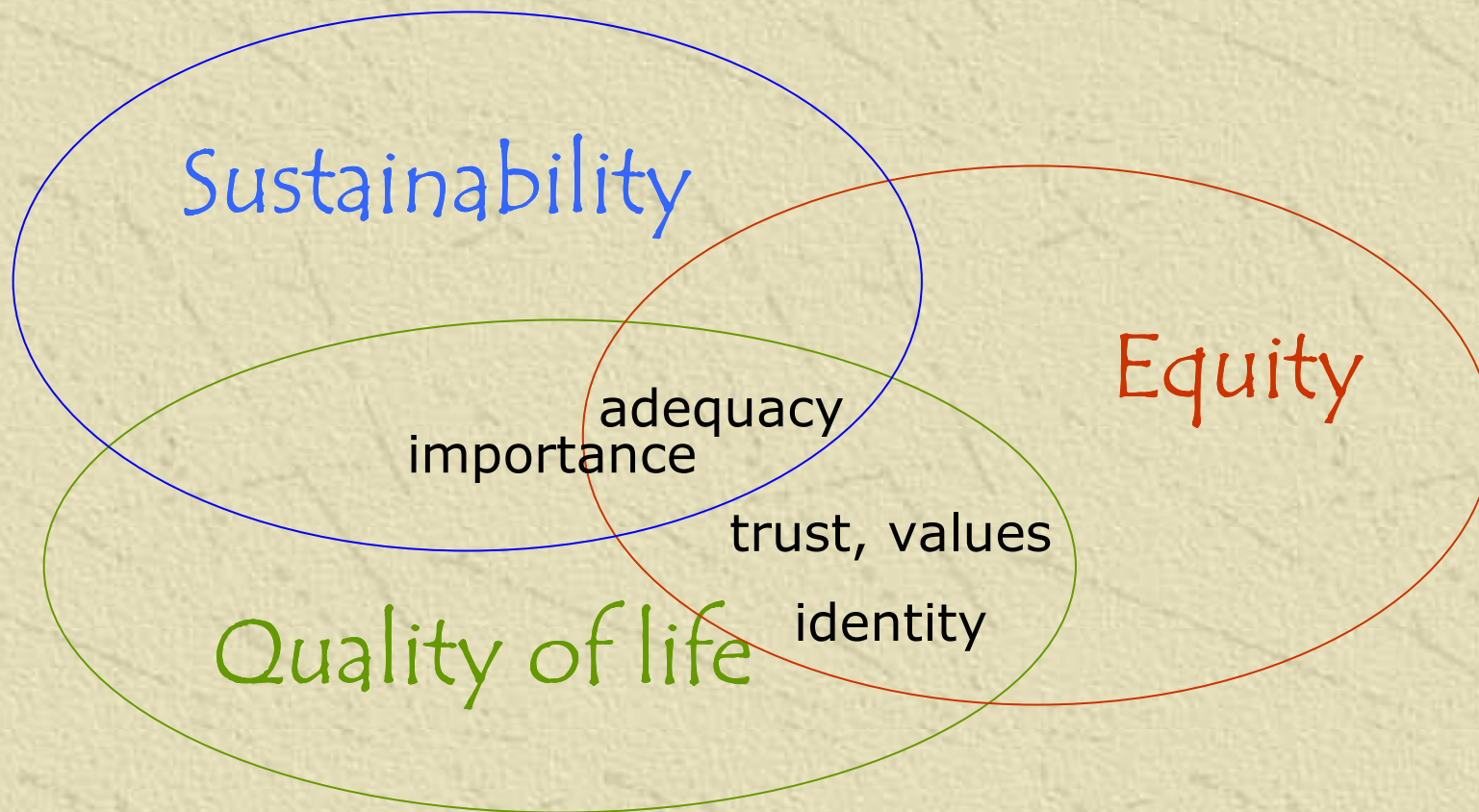
# Sustainability

## Subjective aspects

- internal sustainability (sustainability of individual investments, observed through importance of his/her life's ambitions)
- perceived sustainability (→retrospective and prospective *comparisons*)
- ...

## (a) Conceptual model

The concepts are not sharply distinguished



**(b) Explanatory models**

(a) conceptual model

↪ (b) explanatory model

↪ (c) domains

↪ (d) indicators

↪ (e) synthesis

interpretative and  
explanatory models

# Subjective wellbeing

Interpretative and explanatory  
models



**Classification**

- A. Personality traits
- B. Evaluations and values
- C. Feelings and emotions
- D. Perceptions and functionings
- E. Mixed explanations

## A. Personality traits

subjective wellbeing



individual disposition

individual stable trait *determines* reactive measures in different ambits/life domains



Propensity model



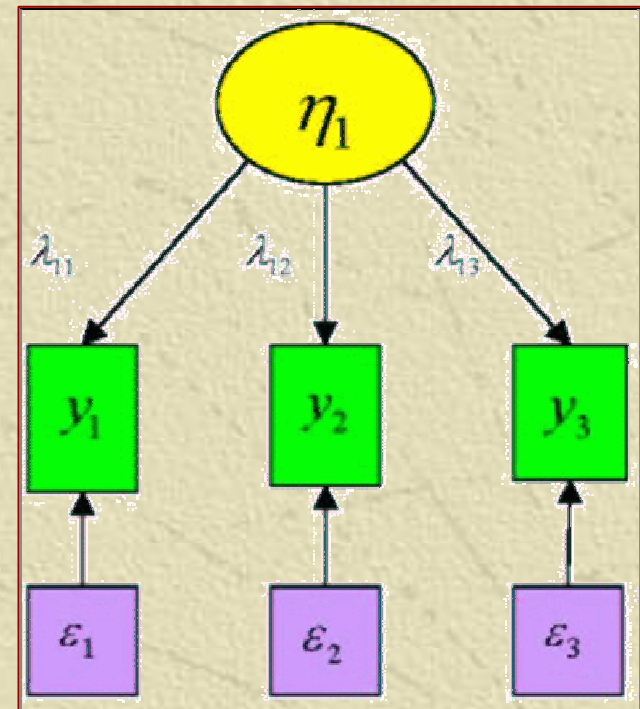
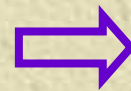
# A. Personality traits

subjective wellbeing



*top-down* approach

**REFLECTIVE MODEL**



Propensity model

## B. Evaluations and values

subjective wellbeing



*Function of evaluation* referring to different  
ambits/life domains

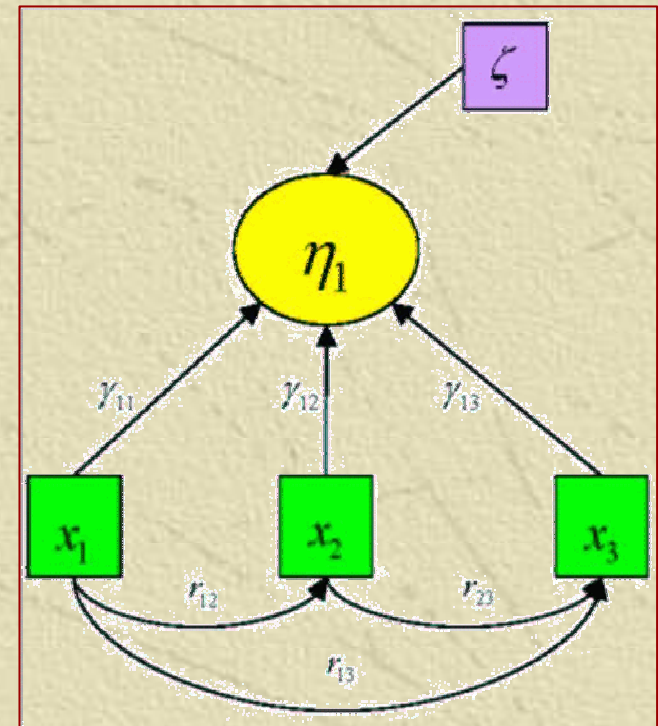
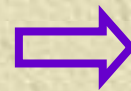


1. Reactivity model

B. Evaluations and values  
subjective wellbeing



*bottom-up* approach  
**FORMATIVE MODEL**



1. Reactivity model

B. Evaluations and values  
subjective wellbeing



Individual **comparison** of objective conditions



2. Social judgement model

## B. Evaluations and values

subjective wellbeing



comparison approach

- smaller the perceived gap
- higher the subjective wellbeing

**Standards are**

- produced by subjective aspirations
- relative and adjusted
- arbitrary (→ individual construction)



2. Social judgement model

## B. Evaluations and values

subjective wellbeing



comparison approach

|                         |                      | Ambits of comparison |      |        |         |       |
|-------------------------|----------------------|----------------------|------|--------|---------|-------|
|                         |                      | Housing              | Work | Family | Friends | ..... |
| Standards of comparison | previous experiences |                      |      |        |         |       |
|                         | with other people    |                      |      |        |         |       |
|                         | with aspirations     |                      |      |        |         |       |



2. Social judgement model

## B. Evaluations and values

subjective wellbeing



multiple discrepancies approach

perceived gap



2. Social judgement model

## B. Evaluations and values

subjective wellbeing



multiple discrepancies approach

one

- has
- wants

gap between

- others have
- one has had in the past
- one expected to have
- one expected to deserve
- expected with reference to needs



2. Social judgement model



## B. Evaluations and values

subjective wellbeing



being aware of what life aspects are vital  
and  
living consistently with those values



3. Purpose and meaning in life model

## C. Feelings and emotions

subjective wellbeing



momentary feelings of positive and negative affects (Kahneman)



1. Hedonic psychology model

## C. Feelings and emotions

subjective wellbeing



positive affects  
are different from  
negative affects (Diener)



2. Positive/negative affect model

## C. Feelings and emotions

subjective wellbeing



Positive feelings and positive functioning in life produce flourishing in life, symptom of “mental health” (Keyes)

Positive emotions theory



3. Human flourishing model

## D. Perceptions and functionings

subjective wellbeing



traditional approach

Flow → function of the relationship between perceived challenge and individual's skill level



1. Flow and engagement model

## D. Perceptions and functionings

subjective wellbeing



## Eudaimonistic identity theory

when people identify their best potentials and engage in activities that move them toward realizing those potentials



1. Flow and engagement model

## E. Mixed approaches

subjective wellbeing



two components

- (i) *reactive state* – acting in short periods  
(moods)
- (ii) *trait* (disposition)



1. Moods and disposition approach

## E. Mixed approaches

subjective wellbeing



up-down approach

**two components**



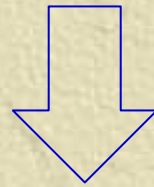
a long-period component (*top-down effect*)  
a short-period component (*bottom-up effect*)



2. Mixed causal model



Each model cannot explain  
subjective wellbeing

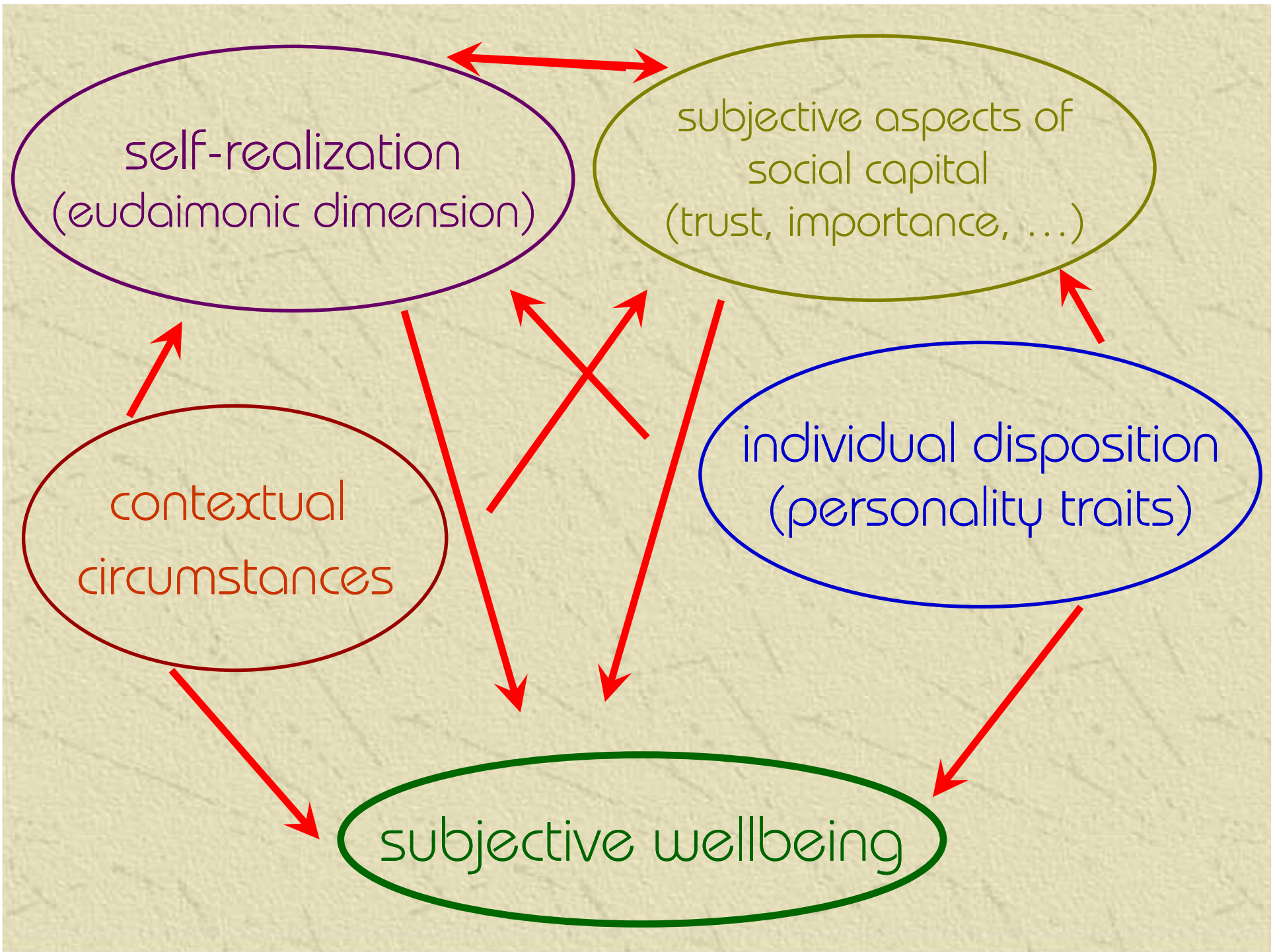


Mixed models are preferable

identifying different determinants



assessing the portion of variance due  
to each of them



**(c) Ambits / domains**

(a) conceptual model

↳ (b) explanatory model

↳ (c) domains

↳ (d) indicators

↳ (e) synthesis

ambits in which concepts  
are measured

## (c) Ambits / domains

Segments of the reality in which concepts should be observed and monitored.

## (c) Ambits / domains

### Ambits / domains in BES \*

Domains in which wellbeing,  
equity and sustainability are assessed



- 1 Environment
- 2 Health
- 3 Economic wellbeing
- 4 Education and culture
- 5 Work and trade-off with life
- 6 Social relationships
- 7 Security
- 8 Subjective wellbeing
- 9 Landscape and cultural heritage

Domains promoting wellbeing,  
equity and sustainability



- 10 Scientific research and innovation
- 11 Quality of services
- 12 Politics and institutions

\* defined by the steering committee

## (c) Ambits / domains

### Ambits / domains in BES \*

Domains related to individual  
wellbeing



- 1 Environment
- 2 Health
- 3 Economic wellbeing
- 4 Education and culture
- 5 Work and trade-off with life
- 6 Social relationships
- 7 Security
- 8 Subjective wellbeing

Contextual domains



- 9 Landscape and cultural heritage
- 10 Scientific research and innovation
- 11 Quality of services
- 12 Politics and institutions

*... seen in a different way ...*

\* defined by the steering committee



## (c) Ambits / domains

*Actually, some ambits are concepts ...*



subjective wellbeing

is one of the conceptual dimensions of  
**B**ES, crossing different ambits /  
domains.

**(d) Measures and indicators**

(a) conceptual model

↳ (b) explanatory model

↳ (c) domains

↳ (d) indicators

measures, indicators,  
benchmarks

↳ (e) synthesis

**(d) Measures and indicators**

**Indicators of subjective wellbeing**



**definition of**

**(i) items**

**(ii) benchmarks**

(d) Measures and indicators

(i) items

Data theory

a rich literature exists → [...]

(d) Measures and indicators

(ii) benchmarks

*Reference point in determining ...*

*... the current situation/position  
with reference to a stated objective*

# (d) Measures and indicators

CONCEPTS



DIMENSIONS



DOMAINS / AMBITS



|          |  |  |                     | health | work | relationships | ... | ... | ... |
|----------|--|--|---------------------|--------|------|---------------|-----|-----|-----|
| <b>B</b> | <b>WELL-BEING</b><br>↓<br><b>QUALITY OF LIFE</b> | Living conditions                            |                     |        |      |               |     |     |     |
|          |  | Subjective well-being                        | cognitive component |        |      |               |     |     |     |
|          |  |  | affective component |        |      |               |     |     |     |
| <b>E</b> | <b>EQUITY</b>                                    | Economic cohesion<br>Social cohesion<br>.... |                     |        |      |               |     |     |     |
| <b>S</b> | <b>SUSTAINABILITY</b>                            | ....<br>....                                 |                     |        |      |               |     |     |     |

... in fieri process ...

**(e) Syntheses**



(a) conceptual model

↳ (b) explanatory model

↳ (c) domains

↳ (d) indicators

↳ (e) synthesis

technical approaches

## (e) Syntheses

The systematic identification of indicators for  
each combination

concept/dimension and ambit/domain

with reference to a conceptual model

produces a

**SYSTEM OF INDICATORS**



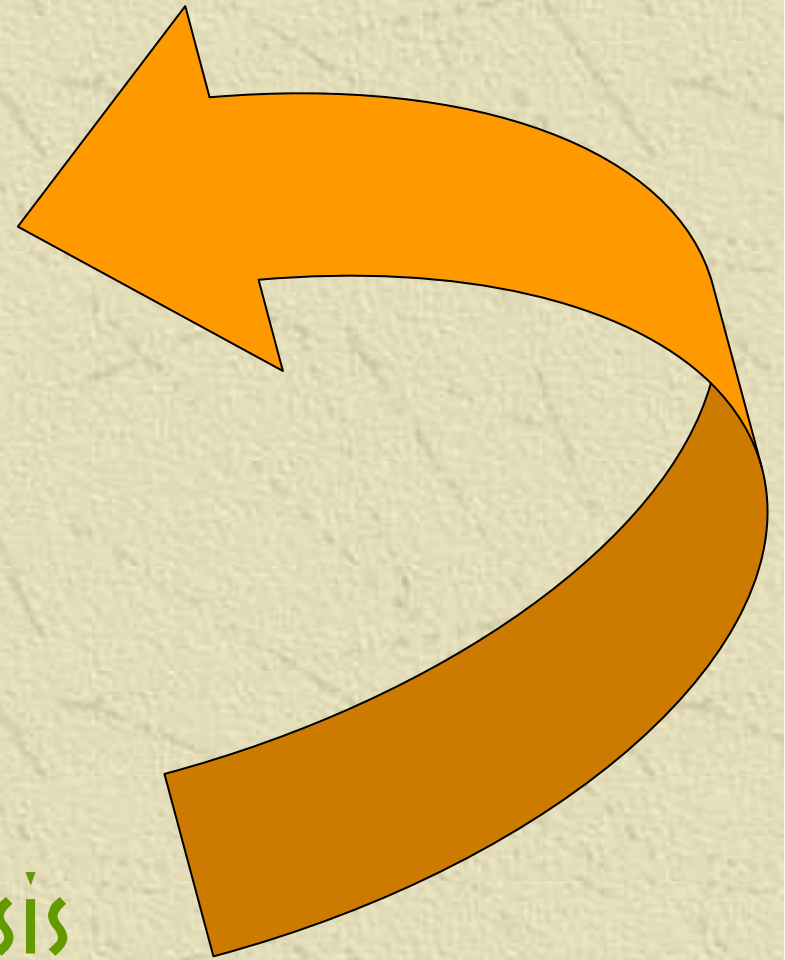
(a) conceptual model

↪ (b) explanatory model

↪ (c) domains

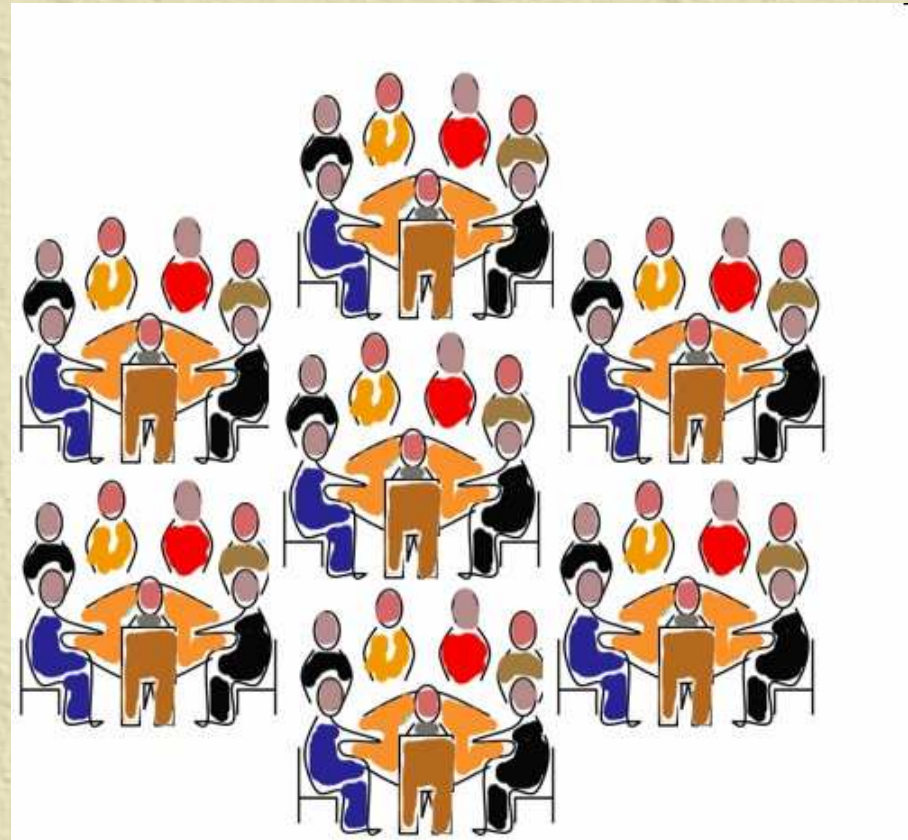
↪ (d) indicators

↪ (e) synthesis



*The process is still in flux* III

III *to be continued* III



# **APPENDIX**

## **SUBJECTIVE WELLBEING IN BES:**

### **THE PROPOSED INDICATORS**

# Cognitive component

## Satisfaction with life as a whole

How much are you satisfied with your life as a whole?

0 -- 10

- Percentage of individuals (age  $\geq 14$ ) showing 8, 9, 10
- Mean / median
- Interquartile range

# Cognitive component

## Satisfaction with ambits

How much are you satisfied with your work?

Four level label scale

- Percentage of individuals (age  $\geq 15$ ) showing “very satisfied”



# Cognitive component

## Satisfaction with ambits

How much are you satisfied with your  
financial situation / family relationship / free time /  
friendships / health?

Four level label scale

- Percentage of individuals (age  $\geq 14$ ) showing “very satisfied”
- synthesis

# Cognitive component

Expectation of improving in satisfaction

Do you believe that your personal satisfaction will improve or worsen during the next 5 years?

- Percentage of individuals (age  $\geq 14$ ) expecting improving their own level of satisfaction during the next 5 years

# Affective component

## Positive affects

Did you feel serene / happy / vital during the last 4 weeks?

always – almost always – part of time – almost never – never

## Negative affects

Did you feel sad / agitated / down during the last 4 weeks?

always – almost always – part of time – almost never – never

# Affective component

## Affect balance

- Percentage of persons with more positive than negative affects
- Percentage of persons with more negative than positive affects