HUMAN VALUES
Change, expression, and variations in the European Union and Portugal (2002-2018)

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Abstract In this work we study values in 13 countries of the EU highlighting the case of Portugal. We use the indicators of "human values" (S. H. Schwartz), "country", "age", "education", and "socio-professional category" from the European Social Survey. Non-responses to the questions on human values exist and are more probable among those individuals in a situation of social exclusion. There is a change at the top of the values' hierarchy in the EU from a configuration in which solidarity with friends, equality, and freedom stand out to one in which solidarity with friends remains at the top but equality declines being replaced by caring for nature, and the valuing of freedom is exceeded by caring for nature and for the well-being of those around you. Differences in values between countries, age groups and social classes are confirmed. Social class introduces variations in more values than age, and variations with social class show higher associations than with country and age in the top values.

Keywords: Human values, value change, European Union, Portugal, social class, age, social orientations.

Valores humanos: mudança, expressão e variações na União Europeia e em Portugal (2002-2018)

Resumo Neste trabalho estudamos valores em 13 países da UE, com destaque para o caso de Portugal. Para o efeito utilizamos os indicadores de "valores humanos" (S. H. Schwartz), "país", "idade", "educação" e "categoria socioprofissional" do European Social Survey. Existem não respostas às questões sobre valores humanos, mais prováveis entre aqueles indivíduos em situação de exclusão social. Há uma mudança no topo da hierarquia de valores na União Europeia, de uma configuração em que a solidariedade com os amigos, a igualdade e a liberdade se destacam, para uma configuração em que a solidariedade com os amigos permanece no topo, mas a igualdade diminui substancialmente, sendo substituída pelo cuidado pela natureza, e a valorização da liberdade é superada pelo cuidado com a natureza e com o bem-estar das pessoas ao seu redor. Confirmam-se diferenças de valores entre países, faixas etárias e classes sociais. A classe social introduz variações em mais valores do que a idade, e as variações com a classe social exibem associações mais elevadas do que com o país e a idade nos valores mais importantes.

Palavras-chave: valores humanos, mudança de valores, União Europeia, Portugal, classe social, idade, orientações sociais.

Valeurs humaines: changement, expression et variations dans l'Union Européenne et au Portugal (2002-2018)

Résumé Dans ce travail nous étudions le changement, l'expression et les variations des valeurs dans 13 pays de l'UE, en mettant en évidence le cas du Portugal. Nous utilisons les indicateurs de "valeurs humaines" (S. H. Schwartz), "pays", "âge", "éducation" et "catégorie socioprofessionnelle" de l'European Social Survey. Il existe des non-réponses aux questions sur les valeurs humaines, lesquelles sont beaucoup plus probables chez les individus en situation d'exclusion sociale. On observe un changement au sommet de la hiérarchie des valeurs dans l'UE passant d'une configuration dans laquelle la solidarité avec les amis, l'égalité et la liberté se démarquent, à une configuration dans laquelle la solidarité avec les amis reste au sommet mais l'égalité décline considérablement et est remplacée par le soin de la nature, et la valorisation de la liberté est dépassée par le soin de la nature et du bien-être de ceux qui nous entourent. Les différences de valeurs entre pays, tranches d'âge et classes sociales sont confirmés. La classe sociale introduit des variations dans plus de valeurs que l'âge, et les variations avec la classe sociale montrent de plus grandes associations qu'avec le pays et l'âge pour les valeurs prioritaires.

Mots-clés: valeurs humaines, changement de valeurs, Union Européenne, le Portugal, classe sociale, âge, orientations sociales.

Valores humanos: cambio, expresión y variaciones en la Unión Europea y Portugal (2002-2018)

Resumen En este trabajo estudiamos el cambio, expresión y variaciones de valores en 13 países de la UE, con énfasis en el caso de Portugal. Para ello utilizamos los indicadores de "valores humanos" (S. H. Schwartz), "país", "edad", "educación" y "categoría socioprofesional" del European Social Survey. Existen no respuestas a las preguntas sobre valores humanos, las cuales son más probables entre aquellas personas en situación de exclusión social. Se observa un cambio en la cúspide de la jerarquía de valores en la UE de una configuración en la que se destacan la solidaridad con los amigos, la igualdad y la libertad, a una configuración en la que la solidaridad con los amigos permanece en la cima, pero la igualdad disminuye la ventaja, siendo superada por el cuidado de la naturaleza, y el aprecio de la libertad es superado por el cuidado de la naturaleza y el bienestar de quienes te rodean. Se confirman diferencias de valores entre países, grupos de edad y clases sociales. La clase social introduce variaciones en más valores que la edad, y las variaciones con la clase social muestran mayores asociaciones que con el país y la edad en los valores más importantes.

Palabras-clave: valores humanos, cambio de valores, Unión Europea, Portugal, clase social, edad, orientaciones sociales.

Introduction

The aim of this text is to carry out a bird's view on values in an exploratory way analysing processes of change, expression and variations in individual values in the European Union (EU) and Portugal.

Individual values are an externalisation of dispositions of social actors produced in certain social conditions, which guide their actions (Weber, 1978 [1922]; Parsons, 1989; Bourdieu, 1987; Almeida, Machado e Costa, 2006).

When considering values' change, there is some consensus that this is a very slow process (Durkheim, 1984 [1893]; Rokeach, 1973; Parsons, 1989; Hofstede, 1980; Inglehart, 1977; Schwartz et al., 2012). And some authors argue that it is not expectable to see a generalized convergence in values since values' change may follow different paths in distinct dimensions within diverse contexts (Hofstede, 1980), while other authors, based on empirical data, point to the existence of a global trend involving a decline of distance to power, masculinity, and uncertainty avoidance, and an increase of individualism (Taras, Steel and Kirkman, 2012).

Against a widespread diagnosis of a decline of morals and values in the 90's of the XX century, R. Boudon uses data from a survey by R. Inglehart, M. Bazanez, and A. Moreno in 47 countries (representing 70% of the world population) (Inglehart, Bazanez and Moreno, 1998) arguing for a gradual trend of dropping out of moral tabus and growing rationalization, guided by a higher valuing of individual dignity and citizenship (Boudon, 2002).

Ronald Inglehart and other researchers have identified a trend initiated in the 70's of the XX century in developed countries for an expansion of post-materialist values and a contraction of materialist values (Inglehart, 1977), and from traditional to secular-rational, and then to self-expression values (Inglehart and Welzel, 2005), but they also indicate a recent backlash to the spread of post-materialist and self-expression values supported by the traditionalist social bases of populist parties (Inglehart and Norris, 2016).

A newer study on values' change between 2002 and 2014 in the European Union unveils a rise of the valuing of tradition and security, and a decrease of self-direction (Casanova, 2018).

It is well-known that in social sciences variations in values are usually associated with social differences. In this paper we will address three theses that accumulated substantial empirical evidence on these associations in contemporary societies: the variation of values with national cultures (Hofstede, 1980), with generation, assuming that generations incorporate distinct societal development acquisitions (Inglehart, 1977), and with social class (Almeida, Machado e Costa, 2006).

Finally, even if the expression of values doesn't seem to be an issue under current scientific scrutiny, we will explore available data with this purpose presuming that it is sociologically relevant to know if all individuals express values, and if not, which are the social characteristics of those who don't.

The present analysis draws on the work of Shalom H. Schwartz on human values, theoretically underpinned by research on trans-situational values (Schwartz, 2021; Schwartz et al., 2012; Schwartz, 1992), and on his collaboration with the European Social Survey (ESS). The ESS database does not contain data prior to 2002, thus limiting the scope of the study on the change in values; however, the multiplicity, diversity and reach of the twenty-one indicators of human values incorporated in this survey from the outset, the fact that regular and updated information is provided, and that results on a range of EU countries and Portugal are included in all its applications weigh decisively in favour of this option.

Besides the human values' indicators, we also use age, country, level of education, occupation, and employment status as social position variables in the ESS database.

The objective is to carry out an extensive study, and data will be analysed using the Statistical Package for Social Sciences.

Analysis of changes, expression, and variations in human values

Changes in human values in the EU and Portugal between 2002 and 2018

A first finding that should be emphasised before turning to the evaluation of processes of change in values is that not all respondents answered the questions in the block on human values (that is, some respondents refused to answer, others said they did not know or simply did not answer). When analysing the data currently available on all 38 participating countries in data collection until 2020 (Round 10), the average non-response rate for the 21 indicators is 3.8% (see Appendix table B). We will return to this finding later.

In order to assess changes in the human values, we selected the data collected between 2002 (Round 1 and the oldest ESS Survey) and 2018 (Round 9 and the last with complete data) and the thirteen countries that participated in every data collection so that maximum consistency in the universe under study could

be maintained and the different timeframes of data collection compared.[1] Portugal is one of these thirteen countries. The most recent data for 2020 is not included because survey results for this year were not available at the time of writing this article.[2] Naturally, only valid answers to the questions on human values are analysed here, that is, the respondents who express values, excluding non-responses.[3]

Our focus will be on the twenty-one item values rather than Schwartz's various aggregations, of ten values or four value orientations for example. Our aim is to make a detailed analysis of the respondents' reactions to the portraits with which they are directly and specifically confronted, given the richness and complexity of this fundamental information, and to avoid any potential deviations, biases and gross or excessive generalisations that can result from aggregating indicators. [4]

In this analysis, we will examine both the score (or rating, which reveals the absolute importance attributed) and the ranking (classifying the relative importance) of human values provided by the respondents — the potential of the two analytical options is discussed by Schwartz (2021: 7), and by Hitlin and Paliavin (2004: 366-367).

European Union

The importance attributed to the human values in the thirteen EU countries between 2002 and 2018 is distributed in four sets with similar median scores and positions in the ranking: values with a median between 1.72 and 2.2 ("very much like me" and "like me"), between 2.28 and 2.99 ("like me"), between 2.95 and 3.42 ("like me" and "somewhat like me") and between 4.1 and 4.7 ("a little like me").[5] These four sets therefore correspond to unequal degrees of importance, ordered in this way because the relevance of the human values is inverse to the score.

In the set of values considered most important (figure 1), "being loyal to friends and devoting time to those close to you" (HV18) is always the most

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1   The rounds and corresponding years are as follows: R1-2002, R2-2004, R3-2006, R4-2008, R5-2010, R6-2012, R7-2014, R8-2016, e R9-2018. The thirteen countries are Germany, Belgium, Slovenia, Spain, Finland, France, Hungary, Ireland, Netherlands, Poland, Portugal, United Kingdom, and Sweden. This set of countries is a good representation of the socio-territorial diversity of the EU.
2   The missing countries are Germany, Spain, Poland and Sweden.
3   To insure valid cross-temporal comparison between countries data-analysis was weighted according to the recommendations of ESS team, applying the Post-stratification Weight and Population Size Weight.
4   The complete formulation of the portraits on which the ESS human value indicators is based can be found in table A of the Appendix.
5   Respondents use the following scale as the reference to position themselves in relation to the proposed portraits: 1 — very much like me; 2 — like me; 3 — somewhat like me; 4 — a little like me; 5 — not like me; 6 — not at all like me. Missing values: 7 — refuse to answer; 8 — don't know; 9 — no answer. We use the median instead of the mean score since the median is considered a more robust central tendency measure, less influenced by outlier and extreme results. The median comes with decimals because we used the median calculated with grouped data (data in database are considered group midpoints), a procedure available in SPSS and a technique recommended for comparative analysis and to make fine distinctions (Jalil and Karami, 2018; Stavig, 1978).

prominent and its weight increases between 2002 and 2014 before decreasing slightly between 2016 and 2018.

This is followed by "treating people equally and defending equal opportunities" (HV3). However, the relevance of this value declines sharply from 2014, with the second position being taken by "caring for nature and protecting the environment" (HV19) in 2018, which was ranked fourth in 2002; it draws close to "helping and caring for the well-being of the people around you" in 2018 (HV12), which takes third place in 2018 after a general upward trend from seventh position in 2002.

Fifth place goes to "making one's own decisions, being free and not depending on others" (HV11) in 2018; this started in third place in 2002 and interrupted a slight upward trend in 2012.

Then comes "understanding people who are different, even when you disagree with them" (HV8), which saw a general rise until 2016 followed by a marked fall; "having a strong government and state that ensure security" (HV14) and "living in a safe environment and avoiding danger" (HV5) also have very similar scores. The relevance of these three values declined, particularly from 2016.

In the adjacent set with slightly less important values (figure 2), respondents identify most with "being humble" (HV9), "having new ideas" (HV1) and "behaving correctly" (HV16); a general slight rise in their significance until 2012 is followed by a decline.

Next in decreasing order of importance come "following tradition" (HV20), "spending time well" (HV10), "doing new things" (HV6), and "looking for fun" (HV21). These are more or less stable values; however, whereas the weight of "looking for fun" increases significantly from 2014 reaching second place in the ranking in 2018, the importance of "spending time well" and "doing new things" declines from 2016 and "following tradition" stabilises after a fall between 2012 and 2016.

The next set with less importance, depicted in figure 3, includes "showcasing talents" (HV4), "doing what you are told" (HV7), "being respected" (HV17), and "being successful" (HV13) with marked fluctuations in their trajectories from 2010 and an upward trend after 2016.

Finally, the set with the lowest scores (even though the respondents consider the respective portraits to be "a little like me") (figure 4) encompasses "seeking adventure" (HV15) and "being rich" (HV2); these values follow a similar trajectory, increasing significantly in importance from 2016.

Overall, these findings corroborate the argument that values change slowly.

A strong trend is immediately visible between 2002 and 2018. More specifically. respondents always identify to a greater or lesser extent with all the human values on Shwartz's list, with the intensity varying between "very much like me" and "a little like me"; none of the values are adopted with a median equivalent to "not like me" (median equal to 5) or "not like me at all" (median equal to 6).

Moreover, while on one hand we can see a constant, albeit slow, growth between 2002 and 2016 in the range of the differences in the human value scores relative to the intermediate scores, which suggests a strong trend in this segment, on
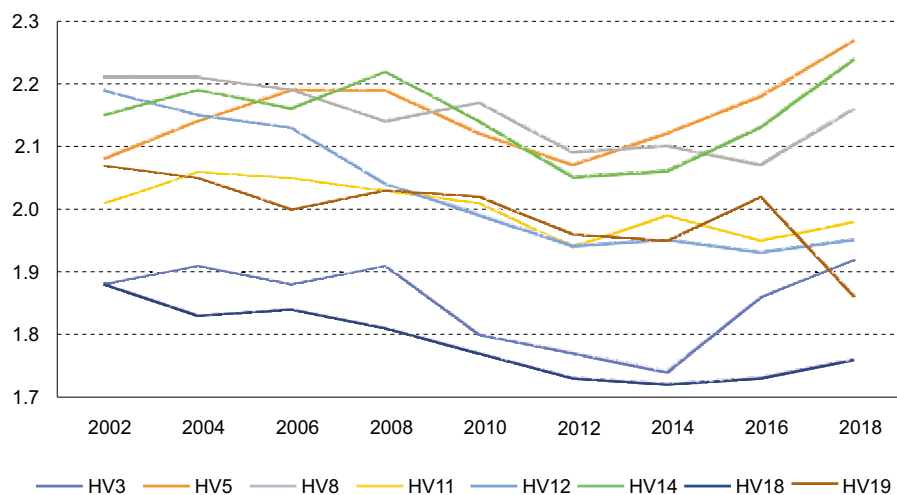
Figure 1   Human values in thirteen EU countries between 2002 and 2018 — median score between 1.72 and
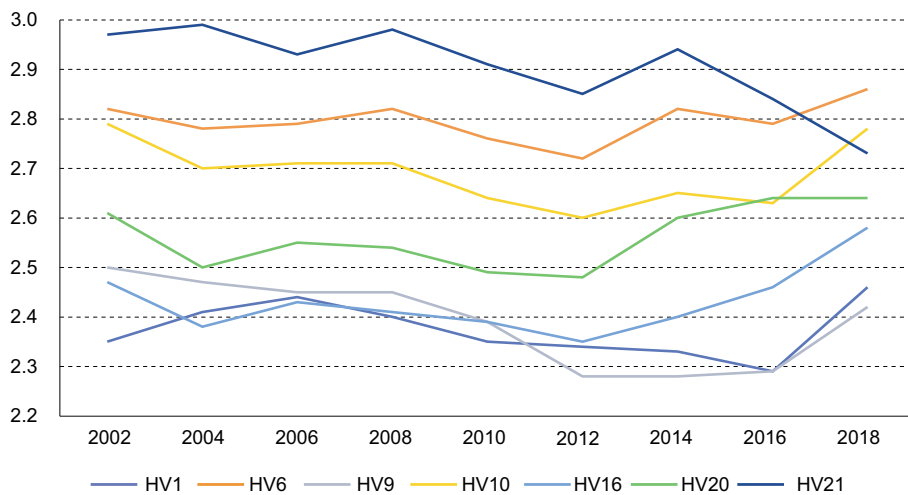2.3 ("very much like me" and "like me").

Source: ESS

Figure 2   Human values in thirteen EU countries between 2002 and 2018 — median score between 2.28 and
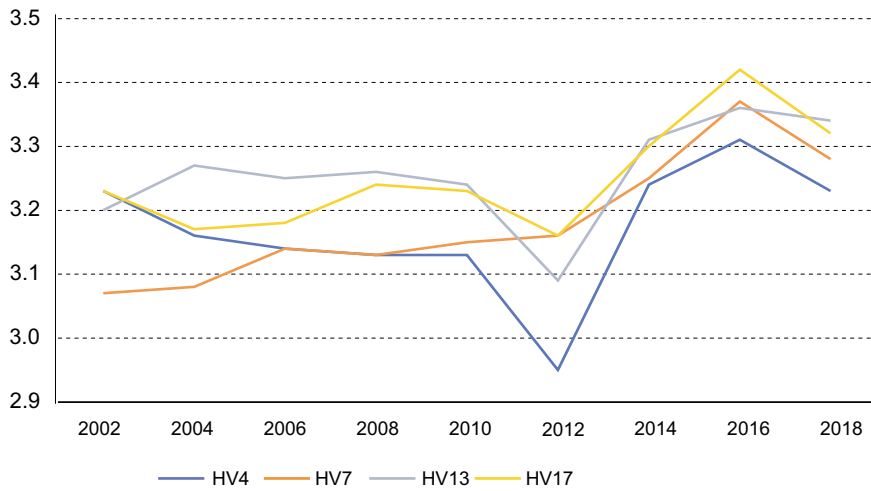2.99 ("like me").

Source: ESS

Figure 3   Human values in thirteen EU countries between 2002 and 2018 — median score between 2.95 and 3.42 ("like me" and "somewhat like me").
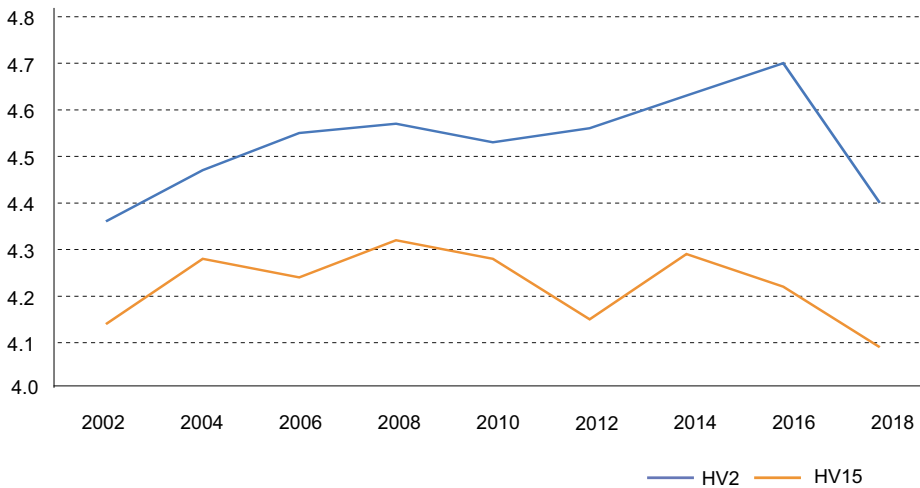
Source: ESS

Figure 4   Human values in thirteen EU countries between 2002 and 2018 — median score between 4.1 and 4.7 ("a little like me").

Source: ESS

the other hand, after 2016 the trajectories of almost all the values show the range narrows, allowing us to speculate that we may be witnessing a seed of change. The only exceptions to this approximation to the intermediate scores are the increase in "caring for nature" (HV19) and "looking for fun" (HV21).

As for the priorities in the value systems in the countries under observation, there are some noteworthy alterations. In 2002, the most prominent values were "treating people equally" (HV3) and "being loyal to friends and devoting time to those close to you" (HV18), which have the same score, followed by "making one's own decisions and being free" (HV11). Although "treating people equally" continues to stand out among these dominant values in 2018, its importance declines and it falls to third place; second place is taken by "caring for nature", while "making one's own decisions and being free" comes in fifth position behind "helping and caring for the well-being of those around you" (HV12). In other words, "being loyal to friends and devoting time to those close to you" continues to be among the dominant values in these countries, but "treating people equally and defending equal opportunities" and "making one's own decisions and being free" have given way to "caring for nature" and "caring for people around you". We can see here a considerable change at the top of the hierarchy, which could represent another seed of change: from a situation in which solidarity with friends and the nominal abstract values of equality and freedom prevail, to one where the focus is on solidarity with those closest to us and caring for nature; whereas the latter assume growing significance, equality rapidly loses weight while freedom falls significantly in the ranking.

Other values in a less prominent though rising position in the ranking or currently with a trajectory of growing importance are "looking for fun" (HV21), "doing what you are told" (HV7), "showcasing talent" (HV4), and "being respected" (HV17).

Portugal

The processes of change in Portugal are more entangled and only two of the sets of human values can be isolated: one with medians of between 1.85 and 3.75 corresponding to the answers "very much like me" and "somewhat like me", and the other with medians ranging between 3.7 and 5.1 referring to the answers "somewhat like me" and "not like me". There are therefore portraits that many respondents do not identify with in this case.

In the first set, which includes the values with the higher identification from the individuals, we can immediately see there were many changes in the positions of the values in the ranking (figure 5).

The most emphasised values in 2002 and in 2018 are "being loyal to friends" (HV18) and "treating people equally" (HV3), and their importance tends to grow overall (albeit unevenly, with the importance of the former stabilising between 2016 and 2018, and that of the latter declining a little over the same period).

Next in the level of importance in 2018 were "helping people" (HV12), "caring for nature" (HV19), and "making one's own decisions" (HV11). These all see an increase in relevance between 2002 and 2018, and all move up at least
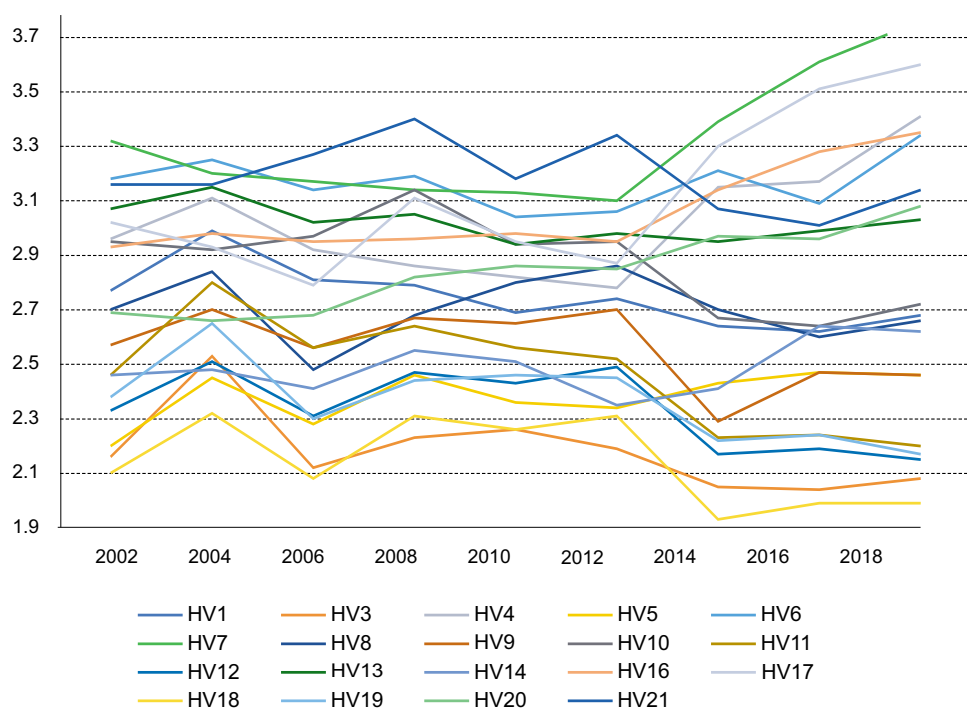
Figure 5   Human values in Portugal between 2002 and 2018 – median score between 1.85 and 3.75 ("very much like me" and "somewhat like me")
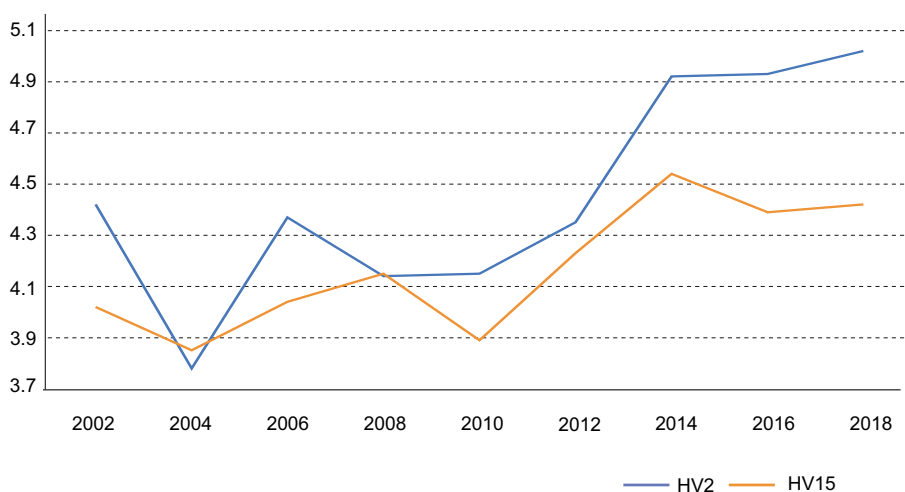
Source: ESS

Figure 6   Human values in Portugal between 2002 and 2018 — median score between 3.7 and 5.1 ("somewhat like me" and "not like me")

Source: ESS

one place in the ranking of values when we compare the distribution between 2002 and 2018.

"Living in safety and avoiding danger" (HV5), which was in third place in 2002, has the most marked change in this set, going up to sixth place in 2018 whilst its absolute importance declined.

Between the seventh and tenth positions in 2018, "being humble" (HV9), "understanding difference" (HV8), "having new ideas" (HV1), "spending time well" (HV10), "being successful" (HV13), and "looking for fun" (HV21) rise, whereas "following tradition" (HV20) and "having a strong government" (HV14) fall.

The upper part of figure 5 depicts the least important values in this set: "doing what you are told" (HV7), "being respected" (HV17), "showcasing talent" (HV4), "behaving correctly" (HV16), and "doing new things" (HV6), which generally follow a downward trend.

Figure 6 portrays the least important values for the Portuguese: "being rich" (HV2) and "seeking adventure" (HV15), both of which are losing absolute relevance.

In short, we see more changes in the values in Portugal than in the thirteen EU countries as a whole.

Moreover, in Portugal we do not see the possible marked trend of respondents' relative identification with all the portraits (the response "not like me" has some significance, particularly for the value "being rich"), and in contrast to what we saw for all the countries under study, the range of the differences in the scores of values widens between 2016 and 2018.

Meanwhile, the least emphasised values ("being rich" and "seeking adventure") are the same and come in the same order, but whereas their importance declines in Portugal, it increases in the thirteen European countries.

The two values considered most important in both 2002 and 2018 in the Portuguese case, namely "being loyal to friends" and "treating people equally", are the same as in the group of EU countries under study and generally behave in a similar way; however, the value equivalent to equality remains in the second position in the 2018 ranking and its absolute importance only declines slightly after 2016. Although the next three values of greatest importance in 2018 are also the same as in the thirteen countries, "helping people" comes before "caring for nature" in Portugal, and "making one's own decisions" follows an upward trend rising from seventh position in 2002.

In addition, "doing what you are told" follows a downward trend in Portugal.

In other words, on the basis of this data, Portugal does not show the same decline in the valuing of equality and freedom as the set of European countries under analysis.

It would be hasty to speculate on any strong trends and particularly any seeds of change in the Portuguese case given the greater volatility of the values. Nevertheless, the analysis undertaken gives us a glimpse of some of the country's specificities in terms of valuations and, in particular, trends.

Importance and consensus of the human values

In light of all the results of this empirical analysis, it is pertinent to estimate the most important and most consensual values in the time period analysed here. In operational terms, the most important values are those with the lowest average medians, and the most consensual are those with the lowest average standard-deviations.

As can be seen from table 1, "being loyal to friends" is the most valued in the thirteen countries under analysis, followed in descending order by "treating people equally"', "making one's own decisions", "caring for nature" and "helping the people around you". The most consensual values between 2002 and 2018 are almost the same (the averages of the standard deviation between 2022 and 2018 are the lowest) but with minor differences: the most consensual value is "being loyal to friends", followed by "helping the people around you", "treating people equally", "understanding difference", and "caring for nature"; "taking one's own decisions" only comes after these. These results also show that the most important values are also the most consensual.

Looking jointly at the results for the averages of medians and standard-deviation, we can say that the most important and consensual human value in these countries in this period is "being loyal to friends and devoting time to those closest to us", followed by "treating people equally and defending equal opportunity", "caring for nature and protecting the environment", "helping the people around us and caring for their well-being", and only then "making one's own decisions and being free, not wanting to depend on anyone".

It can also be concluded that the values that best define the respondents' relationship with society as a whole and that appear to be the most important and consensual are "treating people equally and defending equal opportunity" along with "making one's own decisions and being free, not wanting to depend on anyone"; this is because both "being loyal to friends and devoting time to those closest to us" and "helping the people around us and caring for their well-being" refer primarily to more inter-personal relationships while "caring for nature" does not refer to relationships that are specifically social. "Treating people equally and defending equal opportunity", and "making one's own decisions and being free, not wanting to depend on anyone" as well are the human values that correspond closely with the values of equality and freedom in more abstract terms, as previously said.

The most important and consensual human values in Portugal (those with the lowest median average and standard-deviation between 2002 and 2018) are above all "loyalty to friends", followed by "treating people equally", "helping people", and "caring for nature". In other words, Portugal shares the most important and consensual values of the thirteen EU countries but differs slightly in that it gives greater importance to "living in safety" and less importance to "making one's own decisions".

Table 1   Average median and average standard-deviation of the human value scores in the thirteen EU
                countries and Portugal between 2002 and 2018.

	13EU		Portugal	
	Average median	Average standard-deviation	Average median	Average standard-deviation
Having new ideas	2.37	1.23	2.70	1.10
Being rich	4.55	1.28	4.45	1.16
Treating people equally	1.85	1.01	2.13	1.02
Showcasing talents	3.17	1.38	2.97	1.21
Living in safety	2.15	1.24	2.33	1.09
Doing new things	2.80	1.36	3.12	1.26
Doing what you are told	3.18	1.43	3.26	1.27
Understanding differences	2.15	1.04	2.65	1.06
Being humble	2.39	1.23	2.51	1.09
Spending time well	2.69	1.35	2.83	1.13
Making one's own decisions	2.00	1.11	2.42	1.06
Helping people	2.03	0.97	2.29	0.96
Being successful	3.26	1.38	2.97	1.17
Having a strong government	2.15	1.19	2.44	1.10
Seeking adventure	4.22	1.44	4.17	1.36
Behaving correctly	2.43	1.26	3.01	1.19
Being respected	3.25	1.39	3.07	1.22
Being loyal to friends	1.79	0.87	2.09	0.95
Caring for nature	2.00	1.04	2.32	0.98
Following tradition	2.56	1.42	2.79	1.19
Looking for fun	2.90	1.36	3.14	1.29

Source: ESS.

Social class and value's non-expression

Now back to the respondents who did not answer the questions in the set of human values indicators. We will examine the social characteristics of this population, notably by considering their social class as a relevant indicator of their social position. Here, social class is operationalised as per the ACM model for socio-professional categories and levels of education (Almeida, Costa, and Machado, 1988; Costa, 1999).[6]

In the thirteen EU countries under study, the socio-professional categories where non-responses had most impact in 2018 are: independent farmers (SEF) and salaried agricultural workers (AW), followed by salaried industrial workers (IW), and then by salaried routine employees (RE) and self-employed workers (SEW) (figure 7).[7] The categories with the lowest percentages are intellectual and technical professionals, and supervisory employees (ITPSE), followed by entrepreneurs, managers and self-employed professionals (EMSP).[8]

As for levels of education, the largest proportion of non-responses is among ES-ISCED I (less than lower secondary); ES-ISCED II (lower secondary) comes next

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6   The operationalization of the socio-professional category based on occupation and employment status as per ISCO08 can be found in table C of the Appendix.
7   The following non-responses are included in the scale: 7 — refusal; 8 — don't know; 9 — no answer.
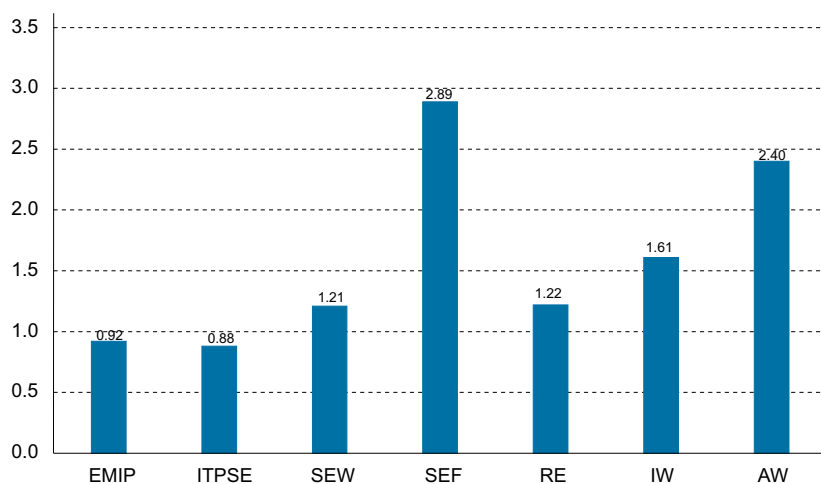8   Data for each human value detailed in table D of the Appendix.

Figure 7   Average percentage of non-responses to the 21 human values indicators in the thirteen EU
countries in each socio-professional category of the respondent in 2018
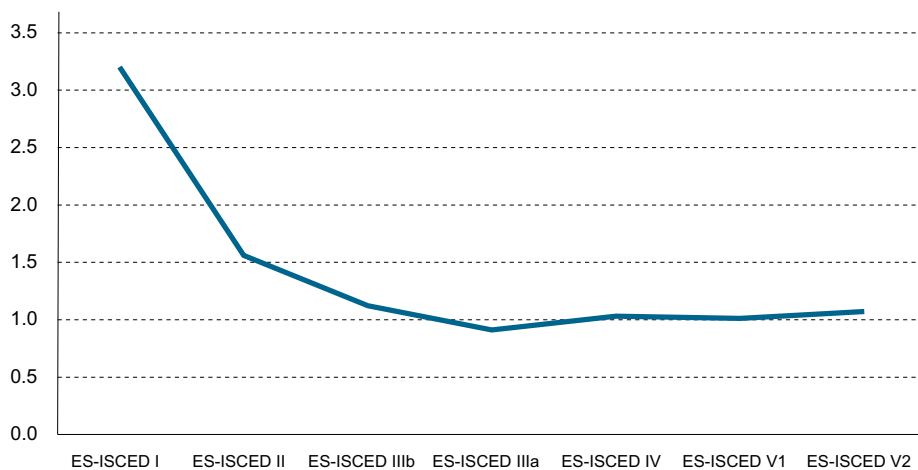
Source: ESS

Figure 8   Average percentage of non-responses to the 21 human value indicators in the thirteen EU countries
in each level of education surveyed in 2018

Source: ESS

but considerably further behind, and then ES-ISCED IIIb (lower tier upper secondary) (figure 8).[9] The percentage of non-responses in the remaining levels of education is low and similar.[10]

In other words, non-responses are much more frequent among people with a lower level of education, who are salaried workers or self-employed, mainly in the primary sector; individuals in this social segment have very few resources and often experience situations of exclusion or, at least, social vulnerability.

On the other hand, respondents with a higher level of education, who are in the more qualified socio-professional categories and with greater organisational and economic power, express values more frequently.

Variation in values per country, age group, and social class

Here we analyse variation in values based on three recurrent perspectives in the literature. We start by examining the variation of values per country, a subject on which Geert Hofstede (2011),[11] for example, has conducted in-depth analysis. Then, we turn to variation in values based on the different age groups. This basically means examining values' variation with people's situation throughout the life cycle and with differences between generations. A significant number of authors have been studying this area, including Ronald Inglehart (1990) who argues for a rise of post-materialistic values that accompany generational change in developed countries. However, the specificity of generational and life cycle effects will not be assessed in the present text, deserving further autonomous attention.[12] And, finally, following Almeida, Costa, and Machado[13] among others, we study the variation in values between different social classes.

We use the data from ESS on the thirteen EU countries in 2018 to analyse the variation of values per country. The analysis of the variations in human values due to age group will focus on Portugal in 2018.[14] The analysis of links between

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9   The International Standard Classification of Education categories are: ES-ISCED I — less than lower secondary; ES-ISCED II — lower secondary; ES-ISCED IIIb — lower tier upper secondary; ES-ISCED IIIa — upper tier upper secondary; ES-ISCED IV — advanced vocational, sub-degree; ES-ISCEDV1 — lower tertiary education, BA level; ES-ISCED V2 — higher tertiary education, >= MA level.

10   Data for each human value is detailed in table E of the Appendix.

11   In addition to G. Hofstede, R. Inglehart and S. H. Schwartz, many other authors have conducted extensive analyses on the differences of values between countries.

12   In addition to Inglehart's work, the wide range of empirical work published on generational change and change of values includes that of Graveliuc (2012) and Ester, Braun and Mohler (2006); there is also research on the intraindividual changes of values linked to shifts in the life cycle, such as that of Bardi (2014) and Bardi et al. (2009).

13   Among other empirical studies on social classes and values, work by Kulin and Svalffors (2013), Longest, Hitlin and Vaisey (2013), Hitlin (2006), Sayer (2005), Xiao (2000), and Kohn (1969), for example, are also worthy of note.

14   This was obtained by calculating the average (52.36 years) and the standard deviation (18.311 years) of respondents' ages; four age groups were then defined with identical intervals based on the average and the standard deviation: up to 34 years, 35 to 52 years, 53 to 71 years, 72 years or over.

Table 2   Association between the different human values with country (EU13), and with age,
                socio-professional category, and education in Portugal, in 2018 (Cramer's V)

	EU13 countries	Portugal age	Portugal education	Portugal socioprofessional category
Having new ideas	0.097	0.100	0.126	0.129
Being rich	0.142	0.152	0.093	—
Treating people equally	0.114	0.102	—	0.107
Showcasing talents	0.136	0.132	0.090	—
Living in safety	0.132	—	—	—
Doing new things	0.092	0.154	0.112	0.110
Doing what you are told	0.121	0.139	0.103	0.109
Understanding differences	0.126	0.099	0.127	0.127
Being humble	0.137	—	0.090	—
Spending time well	0.173	0.155	0.117	0.141
Making one's own decisions	0.103	0.132	0.116	0.105
Helping people	0.133	—	—	0.133
Being successful	0.154	0.162	0.089	0.121
Having a strong government	0.117	—	—	—
Seeking adventure	0.094	0.218	0.145	0.098
Behaving correctly	0.119	0.127	0.144	0.120
Being respected	0.142	0.110	0.090	—
Being loyal to friends	0.116	0.100	0.091	0.138
Caring for nature	0.098	—	—	0.104
Following tradition	0.120	0.164	0.150	0.110
Looking for fun	0.144	0.207	0.147	0.098

Source: ESS, 2018.

social class and values follows the ACM model and operationalises social class using respondents' socio-professional category and level of education, also in Portugal, in 2018.

To examine these variations in human values based on country, age group, socio-professional category and level of education, we calculated the Chi-square, which allows us to assess the statistical significance of the variation, and Cramer's V, which reveals the level of association between the variables in question.[15]

Therefore, cells without numerical values in Table 2 mean that variations aren't significative ($p^3 < 0.05$). Table 2 only shows Cramer's V values, and only when the significance of the variation in human values based on country, age group, socio-professional category and level of education is $p < 0.05$.

Data in Table 2 show that if the variation in values due to the country is always significant ($p < 0.05$), there are five values that show no significant variation for either age group or education, and six values that do not vary significantly in the socio-professional category (in these eleven values no numerical values for Cramer's V are presented in the respective cells in table 2). In other words, it can be said that human values generally vary significantly in accordance with differences in country, age group, socio-professional category and education; however, the differences between

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15   Although Cramer's V is indicated for use particularly when analysing associations between nominal variables, we maintained it even when the variables are both ordinal so as to retain a single referential that maximises technical and statistical comparisons between the four analyses.

countries stand out, impacting all twenty-one human values introduced by Schwartz.

Among the values found to be most important and most consensual in the thirteen EU countries, "helping people", "being loyal to friends" and "caring for nature" all vary with the socio-professional category and the country; however, the variations in the case of the socio-professional category have higher association. Variation in age group and education are only significant in "being loyal to friends".

The other values considered most important and that are the most consensual refer to respondents' relationship with society as a whole, namely, 'treating people equally' and 'making one's own decisions'; these all shows variations with the entirety of the four explanatory variables, with the exception of the variation in the valuing of equality based on education, which is not significant.

Moreover, it should also be noted that the socio-professional category introduces higher variations than age group in terms of equality (V = 0.107 *versus* V = 0.102), and than country in terms of freedom (V = 0.105 *versus* V = 0.103).[16]

"Living in safety" and "having a strong government" are the only values that do not seem to present any variations based on social class in Portugal in 2018.

Social class is therefore a relevant factor in both the significance and the association when we analyse variations in human values, in particular with regard to more important and more consensual values.

Conclusion

We saw earlier that not everyone expresses values. Although only a small minority did not respond to questions on human values in the ESS, this is an extremely important finding given that we know of no reference to it in studies conducted on values.

Considering the universe of those who answered the questions on human values in thirteen EU countries between 2002 and 2018, we found that the following values should be highlighted due to the importance attributed to them and the consensus of this importance: "being loyal to friends", "treating people equally", "caring for nature", "helping those around you", and "making one's own decisions and being free". Also steady, but at the opposite extreme, namely the least important, we find "seeking adventure" and above all "being rich".

"Treating people equally" and "defending equal opportunities", and "making one's own decisions and being free" are particularly relevant as they refer to respondents' relationship with society as a whole and because, as was noted, they generally correspond to the abstract values of equality and freedom.

These values are well-known for the relevance they have in modernity, for instances with the French Revolution, and as a subject in social sciences. They are widely discussed in A. de Tocqueville's *De la Démocracie en Amérique* (1888 [1835]),

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16   The values of Cramer's V are normally quite low. But this association's measure is not very sensible, so little differences may have some statistical meaning.

are considered by K. Marx and F. Engels as fundamental spread values of the dominant bourgeoisie (Marx and Engels, 2011 [1939]), and are frequently highlighted in the study of symbolic-ideological processes in contemporary societies (Rokeach, 1973; Heimer, Vala and Viegas, 1990); they also have correspondence with the orientation towards inequality and action's orientation that operationalise the concept of social orientations used in several studies that prioritise a conceptualisation of orientations rather than of values in sociological analysis (Casanova, 2016, 2004).

Meanwhile, as these are the most important and most consensual values, illustrating the inertia in the values system, they reveal some changes in the countries under observation between 2002 and 2018. More specifically, there is a change at the top of the values hierarchy from a configuration in which solidarity with friends, equality, and freedom stand out, to one in which solidarity with friends remains at the top, but, on one hand, equality declines being replaced by caring for nature and, on the other, the valuing of freedom is exceeded by caring for nature and for the well-being of those around you. Although not as significant, there is also growing support for "looking for fun", "doing what you are told", "showcasing talent", and "being respected".

Recent work (Casanova and Almeida, 2021, 2018) claims that the trend towards the social orientation of heteronomy is rising in some EU countries as the growth of heteronomy is linked to the joint decline in the importance of equality and freedom; given the data analysed here, this claim can be renewed and even strengthened if the observed valorisation of "doing what you are told" is added to the fall in the absolute importance of equality and decline in the relative value of freedom. That study relates the rise in votes for authoritarian and nationalist parties in the EU to this spread of the orientation of heteronomy.

It would be hasty, of course, to conclude that the change in values in these thirteen EU countries is a structural or conjunctural change as it only refers to a short sixteen-year period.

In Portugal, the table of values is very similar to that of all the countries studied, with being loyal to friends and treating people equally standing out among the most important and consensual values; however, in the case of Portugal, equality remains second in the ranking in 2018. Moreover, in Portugal in 2018 helping people comes before caring for nature, and we also notice that freedom is more relevant than in 2002 and the relevance of doing what you are told registers a downward trajectory.

The empirical analysis of human values also shows that there are differences in values between countries, age groups and social classes, confirming similar previous work. And although the differences between countries are significant for all the human values, social class introduces significant variations in more values than age, and variations with social class generally have a higher association than with country and age in the most important and consensual values.

This variation in values in age groups and social classes also supports the expectation that significant changes in the age and class structures may contribute towards changes in values, even though the information analysed refers only to Portugal in a specific year.

As said in the introduction, this is an exploratory work. The main limitations being the short period of 16 years under analysis, that doesn't allow us to substantiate structural changes in values, and the fact that we just deal with European Union countries, and only 13 countries are examined.

But other limitations, namely of methodological sort, may be added. We have seen, for example, that the instruments currently used to collect data on values such as the Schwartz questionnaire, and its theoretical and analytical strategy, leave out a part of the empirical basis it strives to observe — non-responses — against the author's aim of inventorying universally recognised values. Moreover, having confirmed that non-responses are more frequent in certain social classes and basically originate from a socially vulnerable or excluded population, when we dismiss non-responses from the analysis simply because they represent a small minority, this population becomes sociologically invisible and their social exclusion is reinforced. Not answering questions on human values does not mean that the respective respondents' action is not guided in some way; the inclusion of these cases in the sociological analysis therefore calls for theoretical and methodological reformulations. In fact, other studies have attempted to do this, for example by incorporating them in the orientation of exclusion in the conceptualization of social orientations (Casanova, 2016, 2004).

Although the validity of Schwartz's set of human values' indicators has been widely corroborated, it should be remembered that, technically, what is in fact directly measured is the level of the respondents' identification with particular sociocultural profiles and not their adhesion to nominal values. And each socio-cultural profile involves not one but two attributes in two different phrases. This may raise some questions about the operationalisation method's coherence with the theory on which it is based and about the specificity of each basic human value.

Appendix

Table A   Complete sentences of the 21 human values indicators in the ESS, summarised value, code in the database, and code used in figures 1-6

Having new ideas and being creative is important to him/her. She/he likes to do things in an original way	Having new ideas	HV1
It is important to her/him to be rich. She/he wants to have lots of money and expensive things	Being rich	HV2
She/he thinks that everyone in the world should be treated equally. She/he believes that everyone should have equal opportunities in life.	Treating people equally	HV3
It is important for her/him to show her/his talents. She/he wants people to admire what she/he does.	Showcasing talents	HV4
It is important for her/him to live in a safe environment. She/he avoids anything that jeopardises her/his safety.	Living in safety	HV5
She/he likes surprises and is always looking for new things to do. She/he thinks it is important to do lots of different things in life.	Doing new things	HV6
She/he believes that people should do what they are told to do. She/he thinks that people should always follow the rules, even when no-one is looking.	Doing what you are told	HV7
It is important for her/him to listen to people who are different from her/him. Even when she/he disagrees with them, she/he still wants to understand them	Understanding difference	HV8
It is important for her/him to be humble and modest. She/he tries not to attract attention to herself/himself.	Being humble	HV9
Spending time well is important to her/him. She/he likes to "spoil" herself/himself	Spending time well	HV10
It is important for her/him to make her/his own decisions about what she/he does. She/he likes to be free and not dependent on others	Making her/his own decisions	HV11
It is important to her/him to help the people around her/him. She/he wants to take care of their well-being.	Helping those around her/him	HV12
Being successful is important to her/him. She/he expects people to recognise her/his triumphs.	Being successful	HV13
It is important to her/him that the government ensures she/he is safe from all threats. She/he wants the state to be strong so that it can defend its citizens	Having a strong government	HV14
She/he seeks adventure and likes to take risks. She/he wants to have an exciting life.	Seeking adventure	HV15
It is important for her/him to behave correctly at all times. She/he wants to avoid doing things that people consider wrong.	Behaving correctly	HV16
It is important for her/him to be respected by others. She/he wants people to do what she/he says.	Being respected	HV17
It is important for her/him to be loyal to her/his friends. She/he wants to devote herself/himself to the people who are close to her/him.	Being loyal to friends	HV18
She/he strongly believes that people should take care of nature. Protecting the environment is important to her/him.	Caring for nature	HV19
Tradition is important to her/him. She/he tries to follow the customs handed down through religion or family.	Following tradition	HV20
She/he always looks for an opportunity to have fun. It is important for her/him to do things that give her/him pleasure.	Looking for fun	HV21

Table B   Non-valid responses (percentage).

	Refuse to answer	Don't know	Others*	Total
Having new ideas	0.3	1.3	2.2	3.8
Being rich	0.3	0.9	2.3	3.5
Treating people equally	0.3	1.0	2.3	3.6
Showcasing talents	0.3	1.1	2.4	3.8
Living in safety	0.3	0.9	2.3	3.5
Doing new things	0.3	1.1	2.3	3.7
Doing what you are told	0.3	1.5	2.4	4.2
Understanding difference	0.3	1.2	2.4	3.9
Being humble	0.3	1.1	2.3	3.7
Spending time well	0.3	1.0	2.6	3.9
Making one's own decisions	0.3	1.0	2.3	3.6
Helping people	0.3	0.9	2.4	3.6
Being successful	0.3	1.2	2.4	3.9
Having a strong government	0.4	1.4	2.4	4.2
Seeking adventure	0.3	1.1	2.4	3.8
Behaving correctly	0.3	1.1	2.4	3.8
Being respected	0.4	1.3	2.4	4.1
Being loyal to friends	0.3	0.9	2.4	3.6
Caring for nature	0.3	0.9	2.4	3.6
Following tradition	0.3	0.9	2.4	3.6
Looking for fun	0.3	1.0	2.4	3.7
Average of the total				3.8

* Error in recording the answer
Source: ESS

Table C   Operationalisation of the socio-professional category as per the ACM model in the applications between 2012 and 2018 of the ESS

ESS6-9	Employment status		
Occupations ISCO08	Self-employed with 6 or more employees	Self-employed with 5 or less employees and working for own family	Employees
Managers	EMSP	EMSP	EMSP
Professionals	EMSP	EMSP	ITPSE
Technicians and associate professionals	EMSP	EMSP	ITPSE
Clerical support workers	EMSP	SEW	RE
Services and sales workers	EMSP	SEW	RE
Skilled agricultural, forestry and fishery workers	EMSP	SEF	AW
Craft and related trades workers	EMSP	SEW	IW
Plant and machine operators, and assemblers	EMSP	SEW	IW
Elementary occupations	EMSP	SEW	RE/IW*

The 9.1, 9.4, 9.5 and 9.6 professional groups were classified as RE; the others as IW. The Armed Forces were distributed across ITPSE and RE in line with the level of education.
EMSP — Entrepreneurs, managers and self-employed professionals
ITPSE — Intellectual and technical professionals, and supervisory employees
SEW — Self-employed workers
SEF — Self-employed farmers
RE — Routine employees
IW — Industrial workers
AW — Agricultural workers

Table D   Percentage of non-responses on human values by respondent's socio-professional category in the thirteen EU countries in 2018

	EMSP	ITPSE	SEW	SEF	RE	IW	AW
Having new ideas	0.8	0.8	1.1	3.0	1.3	1.7	3.6
Being rich	0.7	0.7	1.1	1.8	1.1	1.4	1.5
Treating people equally	1.1	0.9	1.5	3.9	1.2	1.5	1.9
Showcasing talents	0.8	0.8	1.2	3.3	1.3	1.7	1.9
Living in safety	0.6	0.8	1.2	2.4	1.1	1.4	1.9
Doing new things	0.7	0.8	1.3	3.3	1.1	1.5	2.2
Doing what you are told	1.2	1.4	1.6	3.0	1.8	2.4	2.4
Understanding difference	0.9	0.8	1.0	4.2	1.1	1.7	2.9
Being humble	1.1	0.9	1.3	3.3	1.2	1.5	3.2
Spending time well	0.8	0.7	1.1	2.4	1.0	1.4	2.9
Taking own decisions	0.7	0.7	1.0	2.1	1.1	1.5	1.9
Helping people	0.8	0.8	0.7	2.7	1.0	1.3	1.7
Being successful	1.0	0.9	1.0	2.7	1.2	1.9	2.4
Having a strong government	1.3	1.4	2.4	4.8	1.9	2.4	3.6
Seeking adventures	0.7	0.8	0.9	3.0	1.0	1.5	1.9
Behaving correctly	1.1	1.0	1.3	2.4	1.2	1.8	2.7
Being respected	1.6	1.5	1.7	3.9	1.7	1.8	2.4
Being loyal to friends	0.8	0.7	0.7	2.1	1.0	1.3	1.9
Caring for nature	0.8	0.6	1.3	2.1	1.0	1.4	2.4
Following tradition	1.0	0.8	1.0	1.8	1.2	1.4	2.4
Looking for fun	0.9	0.7	0.9	2.4	1.2	1.3	2.7
Average	0.92	0.88	1.21	2.89	1.22	1.61	2.40

Source: ESS.

Table E   Percentage of non-responses on human values by respondent's level of education in the thirteen EU countries in 2018

	ES-ISCED I	ES-ISCED II	ES-ISCED IIIb	ES-ISCED IIIa	ES-ISCED IV	ES-ISCED V1	ES-ISCED V2
Having new ideas	3.3	1.7	1.3	0.8	1.0	0.8	0.8
Being rich	2.3	1.4	1.0	0.7	0.9	0.9	0.8
Treating people equally	3.0	1.6	1.0	0.9	1.0	1.1	1.1
Showcasing talents	2.9	1.9	1.0	0.9	1.0	0.9	0.9
Living in safety	2.5	1.4	1.0	0.6	0.9	1.0	0.9
Doing new things	3.1	1.4	1.0	0.7	1.0	0.9	0.8
Doing what you are told	4.0	2.1	1.7	1.3	1.4	1.4	1.8
Understanding difference	3.3	1.6	1.2	0.9	0.8	0.9	1.0
Being humble	3.3	1.7	1.0	1.0	0.9	1.0	1.2
Spending time well	2.7	1.3	1.0	0.8	0.8	0.9	1.0
Taking own decisions	2.7	1.4	1.0	0.9	0.8	0.8	1.0
Helping people	2.6	1.2	0.8	0.8	0.9	0.9	1.0
Being successful	3.6	1.5	1.1	1.0	1.1	1.0	1.1
Having a strong government	4.4	2.4	2.0	1.6	1.7	1.6	1.7
Seeking adventure	2.9	1.3	1.0	0.8	1.1	0.8	0.8
Behaving correctly	2.8	1.6	1.0	1.1	1.2	1.0	1.3
Being respected	3.4	1.9	1.4	1.2	1.6	1.7	2.0
Being loyal to friends	2.4	1.2	1.0	0.7	0.8	0.9	0.8
Caring for nature	2.8	1.2	0.9	0.7	0.8	0.8	0.8
Following tradition	2.6	1.3	1.2	1.0	1.0	1.0	0.8
Looking for fun	2.9	1.6	1.0	0.7	0.9	1.0	0.8
Average	3.20	1.56	1.12	0.91	1.03	1.01	1.07

Source: ESS.

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