Connecting the Individual and Cultural Level Value Analysis: The Case of Utilitarianism vs. Traditionalism*

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The studies of cultural dimensions have often shown that the values that are conceptually oppositional behave independently in empirical studies. This article addresses this apparent controversy in an attempt to operationalize one such bipolar value dimension: the utilitarianism–traditionalism scale. The empirical study of this dimension in Estonian and Russian populations in Estonia showed that these value groups are not related on the individual level. It is suggested that the combination of these two values leads to a four-member typology that corresponds to Berry's typology of acculturation attitudes: utilitarianist (assimilationist), traditionalist (segregationalist), modernist (integrationalist), and distancing (marginalizationalist). This allows the results of the empirical study to be transformed to a single dimension, corresponding to the semantic structure of this opposition. It is suggested that the mathematical formula for this could also be used in other pairs of values that are semantically oppositional, but allow all logical combinations on the individual level.

Introduction

Since 1980 there has been a growing body of research on the structure of cultural values. Perhaps the most well-known are Hofstede's (1980) theory of cultural dimensions, Schwartz's (1992) theory of human values, and Inglehart and Welzel's (2005) cultural map of the world. One of the strongest claims has been that there are not only a limited number of universal human values that are recognized across cultures, but that the values align in a limited set of bipolar dimensions. Empirical studies, however, have often shown that the values that are conceptually oppositional

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behave independently in empirical studies (Berry 1994; Chirkov et al. 2005; Li and Aksoy 2007; Schwartz 1990; Triandis and Gelfand 1998).

The current article addresses this apparent controversy in an attempt to operationalize one such bipolar value dimension, that of utilitarianism–traditionalism. The next section defines the notions of utilitarianism (Ut) and traditionalism (Tr), relating them to the main theories on human values mentioned earlier. In the section that follows, the relationship between Ut and Tr is related to the Berry's (1991, 1997) typology on inter-group attitudes, and formalized as a logarithmic function of the ratio of Ut to Tr. The next section seeks to validate this theoretical hypothesis empirically. As the empirical tests support the proposed internal relationship between these values, the final section proposes that this formula could be suitable for modelling other pairs of values that can be treated semantically as opposites of a single scale, but behave independently in statistical terms.

Utilitarianism vs. Traditionalism

The notion of utilitarianism was brought to the field of contemporary intercultural communication by Scollon and Scollon (1995/2001: 115), who encapsulated the utilitarian principles introduced by Bentham, Stuart Mill and other influential writers of the Enlightenment in seven points:

(1) 'Good' is defined as what will give the greatest happiness for the greatest number.
(2) Progress (towards greater happiness, wealth, and individuality) is the goal of society.
(3) The free and equal individual is the basis of society.
(4) Humans are defined as rational economic entities.
(5) Technology and invention are the sources of societal wealth.
(6) Creative, inventive (wealth-producing) individuals are the most valuable to society.
(7) Quantitative measures such as statistics are the best means of determining values.

Scollon and Scollon (1995/2001: 131) argue that even though utilitarian values and the utilitarian discourse system might not in fact be causally connected to the success of western-type societies, such is still widely believed to be the case. Thus, in the pursuit of their own personal goals of success, increasing numbers of people in developing countries adapt to the utilitarian discourse system and its underlying values, making a case for the system's own ascendancy. This in turn contributes to modernization, and the erasure of traditional values, customs, and lifestyles in these societies.

In fact, the opposition of utilitarianism to traditional values and customs was expressed in the very first works of utilitarian writers. John Stuart Mill (1869) states this with some passion:

> The despotism of custom is everywhere the standing hindrance to human advancement, being in unceasing antagonism to that disposition to aim at something better than customary, which is called, according to circumstances, the spirit of liberty, or that of progress or improvement. [—] …the contest between the two constitutes the chief interest of the interest of the history of mankind. The greater part of the world has, properly speaking, no history, because the despotism of Custom is

> complete. [—] Custom is there, in all things, the final appeal; justice and right mean conformity to custom; the argument of custom no one, unless some tyrant intoxicated with power, thinks of resisting.

Thus, utilitarianism is clearly in opposition to something that could be named traditionalist values. Conceptually it is not difficult to define the traditionalist principles as just the logical opposite of the utilitarianism principles (Ehala 2005: 41):

(1) 'Good' is defined by tradition.
(2) Stability is the goal of society.
(3) The conforming individual is the basis of society.
(4) The essence of humanity is an emotional attachment to important others.
(5) Innovation is a disturbance of stability.
(6) Guardians of traditions are the most valuable members of society.
(7) Values are defined by a moral authority.

It should be noted that the Ut–Tr opposition fits well with the findings of the major value theories. First, it has some overlap with the individualism–collectivism dimension of cultures introduced by Hofstede (1980). It is also in concordance with Schwartz's (1992) typology of universal human values. In particular, Ut expresses values connected with openness to change and self-enhancement dimensions such as achievement, self-direction, hedonism, power, and stimulation. Tr values are connected with a conservative dimension that includes tradition, conformity, and security. Also, Ut could be associated with personal and growth-related values, while Tr expressed social and protection-related values (Schwartz 2006). Perhaps the best fit of the Ut–Tr scale is with the scale of traditional vs. secular/rational values used in Inglehart and Welzel's (2005) world values map.

Therefore, it is reasonable to conclude that the opposition expressed in the Ut–Tr opposition is indeed a valid construct that characterizes an important dimension of cultural differences.

It could be assumed that in most cultural groups, the utilitarian and traditionalist discourses are engaged in a modest conflict of innovation and conservation, yet there could be groups that are extremely traditional (like Russian old-believers or Amish) or very utilitarian (like some post-Soviet transition societies). Thus, the ability to measure the level of utilitarianism–traditionalism could be very useful in modelling culture and identity dynamics.

Designing the Scale

According to the models of cultural values, there should be negative correlation between the opposites of this scale. Schwartz (1999) argues, however, that such a correlation occurs only when different cultures are compared, because these values are culture level values not individual level ones. Even though one does not need to assume that the reverse correlation between the opposites must also manifest within one single culture, some principal means is still desirable to explain how the individual values aggregate to the patterns wound at the cross-cultural level (Kagitçibasi 1997).

To operationalize the U-index, a group of 14 statements was designed. Seven statements expressed utilitarian values, seven statements traditional values. The design was inspired by the Schwartz (2003) Portrait Values Questionnaire (PVQ), according to which the subjects are asked

to indicate how similar the person portrayed by the statement is to him/her on a six-point Likert scale (1: Very similar … 6: Very different). To test and elaborate the questionnaire, two pilot studies were administered through a web-based survey system. A total of 154 respondents completed the questionnaire, of which 69 per cent identified Estonian as their first language, 28 per cent Russian, and the rest other languages. The results were subjected to exploratory reliability analysis to find the sub-set of items with the highest value for the Cronbach alpha while still maintaining the bipolar nature of the scale. The highest Cronbach alphas were achieved for a nine-item sub-set of the questionnaire (see Table 1).

Table 1
The Factor Structure of Ut and Tr

	*Component**	
	Traditionalism	*Utilitarianism*
Traditionalism	0.865	
Roots	0.862	
Purism	0.737	
Conservatism	0.674	
Self-realization		0.771
Careerism		0.751
Goal-directedness		0.676
Innovativeness		0.657
Independence		0.424

Note: *Extraction method: principal component analysis. Rotation method: Varimax with Kaiser normalization. A rotation converged in three iterations.

The main study was conducted using this nine-item group of statements (see Appendix 1). The sample of the main study included 969 respondents from all regions of Estonia, 53 per cent being Estonian, 47 per cent Russian speaking, 45 per cent male and 55 per cent female. All age groups from 15 year olds were represented.

In the factor analysis of this sample, the items loaded for the same two factors as in the pilot study, with 62 per cent of the variability explained. As with the pilot study, both scales had acceptable reliability (for Ut, $\alpha = 0.711$ in the Estonian sub-sample of the main study; $\alpha = 0.719$ in the Russophone sub-sample; and for Tr, $\alpha = 0.7912$ for Estonians; $\alpha = 0.792$ for Russophones). Thus, the means for Ut and Tr were calculated for both Estonian (N = 521) and Russophone (N = 448) samples.

If the Ut and Tr were the opposites of the same scale, there should be a negative correlation between them in empirical data. However, contrary to expectations, there was no significant correlation between the means of Ut and Tr in this study. This certainly means that the initial hypothesis that Ut and Tr are opposites on the same value dimension was not correct.

Although the results of the main study showed that Ut and Tr do not form a one-dimensional bipolar scale, there is no doubt that both values are logically related. The question is what the nature of this relation is and how it is manifested in individual value systems. Quite interestingly, this issue can be better understood through the analogy of Berry's (1991, 1997) well-known typology of acculturation attitudes. This typology is derived from two basic questions that could be associated with Ut and Tr (Table 2).

If it is possible to answer both questions positively, as Berry's model suggests, propensity to openness to change could not be considered as conceptually incongruent with tendency to maintain traditional values. This analogy encourages us to hypothesize that Ut and Tr value categories enable a similar two-way typology (presented in Table 3).

What Table 3 reveals is that even if Ut and Tr do not constitute two poles in a single values scale, the two apparent poles have existence and correspond to highly salient intergroup behaviour

Table 2
Acculturation Attitudes

		Is it Considered of Calue to Maintain One's Linguistic and Cultural Identity?	
		Yes	*No*
Is it considered of value to adopt the linguistic and cultural identity of the dominant majority?	Yes	Integration	Assimilation
	No	Separation	Marginalization

Source: Berry (1997: 10).

Table 3
Attitude Types on the Ut and Tr Scale

		Traditionalism	
		High	*Low*
Utilitarianism	High	Modernist (tendency to integration)	Utilitarianist (tendency to assimilation)
	Low	Traditionalist (tendency to segregation)	Distancing (tendency to marginalization)

prototypes. What is no less important is that the other two logical possibilities also have been attested, although they may not be as sharp as the two extremes. Thus, even though Ut and Tr do not formally form a single continuum, their distributional pattern in human societies still creates an appearance as if they were indeed. For this regularity to be expressed quantitatively, the two variables need to be transformed into a one-dimensional scale. To capture this regularity, the position of any single person on the bipolar scale of Ut–Tr can be expressed by simply calculating the ratio of Ut to Tr:

$$U = Ut/Tr \qquad (1)$$

In this manner, for any combination of values for Ut and Tr, the higher the outcome, the more utilitarian is the value system of this person (or the population, if the average over its members U values is calculated). If the Ut and Tr values are equal, the outcome is 1, the middle point of the scale and if Tr is larger than Ut the value of U is smaller than 1, indicating low utilitarianism, that is, high traditionalism.

The problem with this formula is that it produces a scale with unequal arms. Let's assume than both Ut and Tr can vary between 1 and 6, following the 6 point Likert scale used in the questionnaire. In this case the most utilitarian person would have the U-index value 6 (U = 6/1) while the most traditional person has 0.17 (U = 1/6) and a person whose value system is balanced in respect of Ut and Tr would have 1 (U = 6/6 = 5/5 and so on). Conceptually this is an undesirable result, as there is no reason to assume that the maximally utilitarian person would be more extreme than a maximally traditional one.

To overcome this deficiency, the scale needs to be transformed to a symmetrical form. This can be done using the logarithmic function. This function does not change the underlying rationale behind the calculation, but just transforms it to symmetrical scale from –1 in the case of highest traditionalism (U = 1/6) to +1 in the case of highest utilitarianism (U = 6/1), zero outcome indicating the balance of Ut and Tr. To avoid negative values,

the whole calculation is added 1. The updated formula is presented in (2):

$$U = \log (Ut/Tr) + 1 \qquad (2)$$

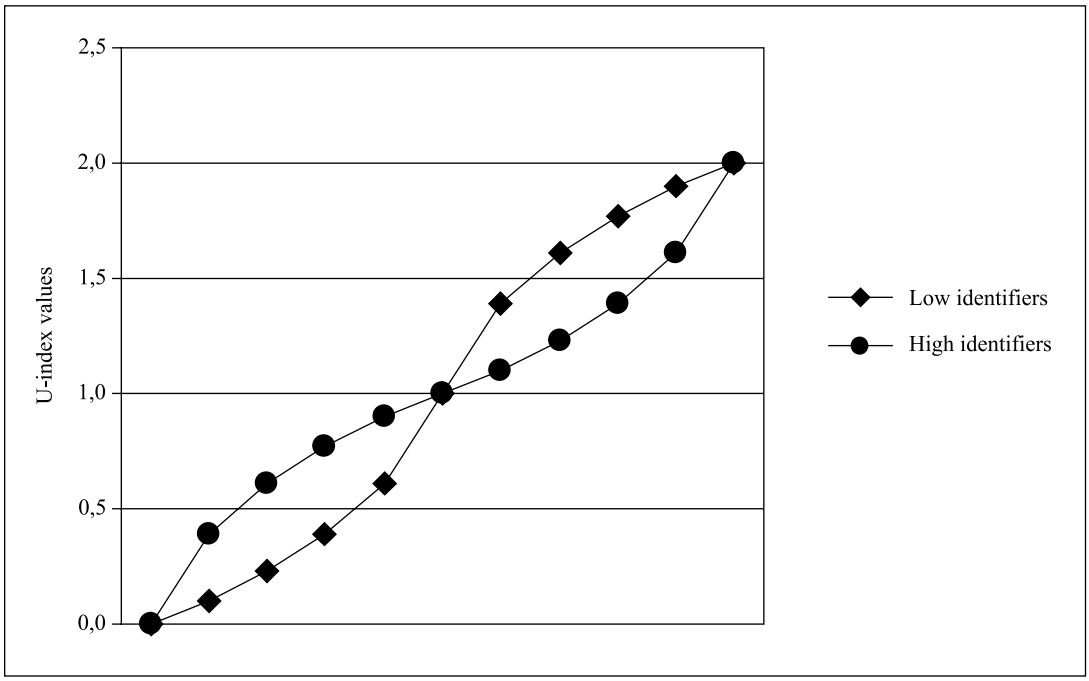
This formula would give a range of U-index values from zero (total traditionalism) to 2 (total utilitarianism), as indicated in Figure 1.

Here we see the range of U-index values that the formula returns to possible variations in the values of Ut and Tr. If the value of Ut is minimal and Tr is maximal, U equals zero (maximal traditionalism). As the value of Ut increases while Tr is kept maximal, the U values start to grow and approach 1 when both Ut and Tr have maximal value (indicated by the high identifiers line). When the value of Tr starts to decrease gradually while Ut remains maximal, the U values start to grow greater than 1 (high identifiers line) until they approach the maximal value 2 (maximal utilitarianism).

The line for low identifiers represents the situation when the value of Ut is minimal and Tr maximal (U = 0) and Tr starts to decrease while Ut is kept minimal. When Tr also reaches minimal value, U = 1. The low identifiers line approaches 2, when Ut starts to grow while Tr is kept minimal. Generally the area defined by the lines of high and low identifiers is the range of all possible value combinations that can result from this formula.

As can be seen from the Figure 1, the model is not able to differentiate between high and low identifiers when Ut = Tr (in this case the outcome is 1 even if the person rejects both values

Figure 1
Relation between Ut and Tr Expressed as a Logarithmic Function



(Ut = 1 = Tr) or supports both values (Ut = 6 = Tr). Even the slightest imbalance between Ut and Tr leads, however, to different outcomes for high and low identifiers. In the case of Ut H ≈ Tr, for high identifiers the U-index remains close to 1 while for low identifiers the same imbalance will result in much greater deviation from 1. Conceptually, this means that high identifiers are balanced in between utilitarianism and traditionalism even if they have a slight preference for one of them; this balance is much less stable for low identifiers. The model predicts that already a small preference for one of the values affects their overall attitude much more in this direction than it would do in the case of high identifiers. In the case of moderate identifiers (Ut = 3 = Tr) the function is close to linear in between of the extremes. Thus, for most of the data, this difference does not play any significant role.

Testing the Instrument

To test the hypothesis, the means of Ut and Tr were used as input variables for calculating the U-index using the formula presented in (1). As a first test, the relation of various socio-demographic factors to the variance in the U-index values was assessed.

The sample means for the U-index were 0.88 for the Estonian sample and 0.90 for the Russophone sample, indicating that both groups tend slightly towards traditionalism. The difference between groups is almost non-existent. There were, however, some interesting differences in U-index values depending on socio-demographic factors. In the Estonian sample, females were revealed to be more traditionalist than men, and people younger than 26 less traditionalist than all other age groups. Wealthier people were also less traditionalist than people with low incomes. The Russian sample showed the same trends, except that the impact of sex and income were not statistically significant, whereas age differences were larger than in the Estonian sample (see Table 4).

Table 4

Variation in Mean Values of the U-Index

		Estonians		*Russophones*	
		Mean	*Count*	*Mean*	*Count*
Sex	Male	0.92(1)	244	0.90	190
	Female	0.85(1)	294	0.89	270
Age	Under 26 years	0.95(1, 2)	118	1.00(1)	81
	26 to 45 years	0.88(1)	199	0.92(1)	168
	Older than 45	0.85(2)	221	0.83(1)	211
Income	Below average	0.85(1)	156	0.88	166
	Average	0.89	287	0.91	242
	Above average	0.93(1)	78	0.92	38

Note: The mean difference between co-indexed groups is significant at the 0.01 level.

As the U-index differences, particularly the ones connected with age and family income, agree with the attested trends in society, the results of the analysis support the validity of the instrument. A further test was performed by two-way cluster analysis using three continuous variables—U-index, Ut, and Tr as input.

In the Russophone sub-sample, four clusters emerged as predicted by the theoretical model and were labelled accordingly (Table 5).

As Table 5 shows, the cluster variability in U-index values is quite large: the lowest cluster (traditionalists) has the mean U-index value 0.66 and the highest cluster (utilitarianists) the U-index value 1.29. Thus, the difference between the extreme clusters is 31.5 percentage points of the total scale. This is a large variation and indicates

Table 5
Value Combination Clusters in the Russophone Sample

	U-Index	*Tr*	*Ut*	*Size of Cluster*	
Cluster	*Mean*	*Mean*	*Mean*	*N*	*Per* cent
Modernists	0.90	4.81	3.96	202	45.1
Traditionalists	0.66	4.78	2.48	105	23.4
Distancing	0.93	3.38	2.92	88	19.6
Utilitarianists	1.29	2.53	4.11	53	11.8

that even if there is a mean value that would characterize the culture as a whole, it is a rough approximation over diverse sub-groups.

The underlying value combinations are also quite telling. The means for Tr and Ut are almost mirror images for clusters of traditionalists and utilitarianists. Remember that the verbal equivalents of the six-point scale are the following: (1: Absolutely different from me; 2: Does not resemble me almost at all; 3: Does not resemble me significantly; 4: Resembles me to some extent; 5: Resembles me; 6: Resembles me very much). Thus, a mean response between points 2 and 3 would signal moderate distancing from the value group while a mean response between points 4 and 5 would indicate identification, although not much emphasized.

The clusters representing modernists and distancing have very close U-index values. In fact, there is no information in the U-index alone to discriminate between these groups. This could be done only by comparing the means for Ut and Tr values. The modernists cluster has high mean values for both Tr (4.8) and Ut (3.9). Thus, modernists are rather high identifiers for both value groups. Note that this cluster is the largest in the sample (45 per cent of the total). The cluster of distancing is rather modest in identifying with the two value groups—the means are close to 3, which signals moderate distancing. The mean values around 3, however, are not markedly low. Thus, the distancing is also rather modest, certainly not of the magnitude that would encourage the notion of marginalization.

The clusters also have some connections to socio-demographic characteristics, enabling us to draw a portrait of the typical holder of each value combination. These characteristics are presented in Table 6.

The cluster analysis of the Estonian subsample (N = 521) gave slightly different cluster combinations, although the main patterns are clearly visible (Table 7).

Table 6
The Socio-Demographic Profiles for the Clusters in the Russophone Sub-sample

Cluster	*N*	*Per cent*	*Characteristics*
Modernists	202	45.1	Higher than average educational level (53 per cent with university degrees belong to this cluster), self-employed or entrepreneur (78 per cent of the group belong to this cluster), but also retired persons (50 per cent) and unemployed (52 per cent) belong here.
Traditionalists	105	23.4	Over 45 years old (32 per cent), low educational level (41 per cent of those with less than basic education or secondary vocational education (28 per cent) belong here). Retired (30 per cent) and/or with the average income (28 per cent).
Distancing	88	19.6	This group has higher than average amount of unmarried people (26 per cent), unemployed (32 per cent) and homemakers (29 per cent). Surprisingly, the number working in the public sector is also high here (24 per cent).
Utilitarianists	53	11.8	Under 26 years (27 per cent) or between 26 and 45 years (16 per cent), studying (28 per cent), or working in public sector (16 per cent), city dwellers.

Table 7
Value Combination Clusters in the Estonian Sub-sample

	U-Index	*Tr*	*Ut*	*Cluster Size*	
Cluster	*Mean*	*Mean*	*Mean*	*N*	*Per cent*
Utilitarianists	1.21	2.54	3.72	38	7.3
Modernists	0.99	4.72	4.61	122	23.4
Distancing	0.90	3.86	3.18	109	20.9
Nationalists	0.83	5.26	3.71	162	31.1
Traditionalists	0.66	4.90	2.50	90	17.3

As in the Russophone sample, in the Estonian sample, too, the utilitarianist and traditionalist clusters diverge sharply. The clusters of modernists and distancing are also close to the corresponding clusters in the Russophone samples. The difference between these samples lies in cluster 4 in the Estonian sample. This cluster could be labelled as nationalists, as it includes very high identifiers with traditionalist values who still admit to a degree of utilitarianism. As in the Russophone sample, the clusters have connections with socio-demographic characteristics that enable us to draw the profiles of prototypical members of each cluster (Table 8).

To summarize, the cluster analysis revealed clear and well-contrasting groups in both the Russophone and Estonian samples. The socio-demographic profiles of the prototypical members of clusters are psychologically feasible. Thus, it could be concluded that the empirical test gave some empirical support for the validity of the construct.

Implications and Conclusion

This empirical study of the value structure of the Estonian population in Ut and Tr dimensions confirmed that on the individual level these two value sets are not necessarily incongruent—there was a large sub-group that identified strongly with both value types in both the Estonian and Russophone samples. Yet there is no denying that traditionalism and utilitarianism are in ideological opposition. At least this is how the relationship between these values has been constructed in our western-type societies.

Be that as it may, the reality of the Ut–Tr opposition is supported by the fact that the corresponding value combinations can be empirically attested, as the analysis of Estonian and Russophone samples indicated. Although there need not be any statistical correlations between these values across individuals in any population, the prototypical sub-groups representing both extremes still emerge, as the study showed. This enables us to treat the Ut–Tr opposition as one-dimensional, despite the fact that the components behave independently in statistical terms.

Furthermore, the suggested model and the results of this study can explain the relationship between individual level values and collective level values. Although perhaps all cultures have sub-groups whose value configurations correspond to the types predicted by the model, the sizes of these sub-groups, and their socio-economic prominence can vary across cultures. It is likely that the value configuration of the dominant sub-group represents the legitimized value configuration in that culture better than just the average mean for the whole population.

It is also likely that this legitimized value configuration is strongly represented in the school discourse. It cannot be assumed, however, that the student population necessarily adheres to this particular configuration. The large age differences in subscribing to Ut and Tr that were revealed in this study cast doubt on this assumption. In this respect, Schwartz's (1992) methodology using student samples might not be fully representative for obtaining culture level values. Perhaps a

Table 8

The Socio-Demographic Profiles for the Clusters in the Estonian Sub-sample

Cluster	*N*	*Per cent*	*Characteristics*
Utilitarianists	38	7.3	Younger than 26 years (16 per cent), slightly overrepresented by males (9 per cent), having less than basic education (28 per cent), or secondary vocational education (9.5 per cent), unemployed (13 per cent), studying or self-employed.
Modernists	122	23.4	Under 26 (31 per cent), secondary school or university education (both 28 per cent), living in the capital area, self-employed, (30 per cent) student (27 per cent), or public sector workers (25 per cent).
Distancing	109	20.9	From 26 to 45 (28 per cent), male (25 per cent), unmarried (23 per cent), having vocational education (26 per cent), working in the private sector (24 per cent) or unemployed (33 per cent), living in the Russian majority areas in Estonia (30 per cent).
Nationalists	162	31.1	Socio-demographically diverse group. People older than 45 years (40 per cent) and pensioners (37 per cent) belong here, but also university students (38 per cent).
Traditionalist	90	17.3	Females (24 per cent), with vocational education, middle age or older, retired, or home makers.

more sophisticated analytic procedure where the major value configurations for any given culture are specified on the individual level would be beneficial.

The logarithmic formula introduced in this paper provides a solution for how to relate two value dimensions that on conceptual grounds could be classified as two opposites of one dimension, but empirically behave independently. By making this relationship explicit, it can relate the study of values on the individual level to the study of values on the collective level. This could help to reduce the gap between micro and macro levels of analysis.

Appendix 1

Questionnaire Measuring Ut–Tr Value Dimension

	Title	*Item*
Utilitarianism	Independence	It is important for him/her to do things on his/her own. He/she likes to be free and not to depend on others.
	Goal-directedness	He/she does not want to waste time on unimportant people and things that do not take him/her forward in life. It is important for him/her to concentrate on achieving his/her goals.
	Self-realization	Self-realization is more important to him/her than relations with loved ones. He/she is not afraid of ruining relations if these start to disrupt the fulfillment of his/her goals.
	Careerism	Career success is more important to him/her than friends and acquaintances. He/she would be ready to move home if he/she received a lucrative job offer, even if it meant losing his/her existing social network.
	Innovativeness	He/she is open to all that is new. He/she finds that traditional ways of living and old-fashioned values have become a hindrance to progress.
Traditionalism	Conservatism	Following traditions is important to him/her. He/she considers abandoning family, religious, or cultural customs inappropriate.
	Roots	He/she values his/her roots, heritage culture, and birth community highly.
	Traditionalism	He/she considers it important to follow the practices of his/her culture. It is important to him/her that his/her children should value these customs and traditions, too.
	Purism	Linguistic and cultural purity is important to him/her. He/she tries to avoid foreign influences in his/her language and behavior.

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