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## THE QUALITY-OF-LIFE (QOL) RESEARCH MOVEMENT: PAST, PRESENT, AND FUTURE

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**ABSTRACT.** The purpose of this paper is to trace the history of the social indicators or quality-of-life (QOL) research movement up to today, forecast future developments, and pave the way for future growth. Broadly speaking, we tried to review historical antecedents from the point of view of different disciplines, with specialists in each discipline preparing the basic text and co-authors helping to polish the material into a finished product. Briefly, we begin with an overview of the conceptual and philosophical foundations of our field of research. That is followed by a historical overview of the sociological roots of our field. In the third section, the main contributions from the discipline of economics are reviewed. The fourth section covers a historical overview of research on subjective well-being. Following that, the fourth section covers a historical overview of the literature on health-related quality of life is provided. Next, the history of QOL research from a marketing perspective is reviewed followed by a history from the perspectives of industrial/organizational psychology and management. Finally, we offer some forecasts for future QOL studies that are intended not only to predict what might happen, but to encourage, stimulate and motivate researchers to undertake new initiatives.

### CONCEPTUAL AND PHILOSOPHICAL FOUNDATIONS (ALEX C. MICHALOS)

This overview is divided into two parts. In the first part, some of the fundamental concepts employed in social indicators research are defined, a checklist of critical issues in social indicators construction is provided, some of the main uses and possible abuses of indicators, social reports and accounts are explained, and a brief explanation of the problem of evaluating and balancing objective and subjective indicators is given. In the second part, some of the historic philosophical roots of this field of research are reviewed.

*Conceptual Foundations*

The term *social indicator* is used to denote a statistic that is supposed to have some significance for measuring the quality of life. The term *social report* designates an organized collection of social indicators, and *social accounts* designates some sort of balance sheet in which costs and benefits are assigned to the indicators in a social report. Briefly, the main difference between social reports and accounts is that the former answers the question "How are we doing?" and the latter answers the question "At what price?", where price might be measured in dollars, energy, personal satisfaction or dissatisfaction, or some other generally applicable medium.

From a linguistic point of view, social indicators usually consist of a term denoting a subject class and a term denoting what I call an *indicator property*. For example, the second term of the phrase "infant mortality" denotes the indicator property mortality and the first term denotes a particular class of things, namely, infants that may possess that property. By replacing the subject term "infant" by "one year old", "two year old", etc., one can routinely generate (social) mortality indicators for as many age groups as one likes. Similarly, by replacing the subject term by "male", "Indian", etc., one can routinely generate mortality indicators for as many kinds of groups as one likes.

*Social indicator phrases* are like variable names in logic and mathematics, and social indicators are like the variables themselves. Furthermore, just as one speaks of the values of variables in logic and math, one may speak of the *indicator-values* of social indicators. For example, the annual percent of undergraduate degrees awarded to females in engineering in the United States in the 1990s was about 16%. So, we may say that this variable (annual percent of undergraduate degrees awarded to females in engineering in the United States in the 1990s) had an indicator-value of 16%.

Social indicators that refer to personal feelings, attitudes, preferences, opinions, judgments or beliefs of some sort are called *subjective indicators*, e.g., satisfaction with one's health, attitudes toward science or scientists, beliefs about the dangers of some new technology. Social indicators that refer to things that are relatively easily

observable and measurable are called *objective indicators*, e.g., the height and weight of people, numbers of automobiles manufactured or sold each year, numbers of people employed in research and development. Some researchers use the term 'social indicator' as a synonym for 'objective indicator' in my terms, and use the term 'quality of life indicator' as a synonym for 'subjective indicator' in my terms (Michalos, 2003; Solomon, 1980). During the cold war years, some Eastern European researchers preferred to talk about 'way of life' rather than 'quality of life', with the former term applying only to observable behaviour, especially the use of one's time for daily activities (Andorka and Harcsa, 1990). I think my terminology is used by the majority of researchers, but I have never undertaken a detailed survey to test this assumption.

*Positive indicators* are such that most people will assume that if their indicator-values increase, some facet of the quality of life is improving, e.g., elderly citizens incomes and minority-group educational attainment. The female engineering degrees indicator mentioned above would be regarded as a positive indicator by those who think that the quality of women's lives tends to improve as their access to the full range of professional occupations improves. *Negative indicators* are such that most people will assume that if their indicator-values increase, some facet of the quality of life is deteriorating, e.g., infant mortality rates and murder rates. (Notice that an indicator is regarded as positive or negative not in virtue of whether or not its values in fact increase or decrease, but only in virtue of whether or not most people would like its values to increase or decrease, i.e., not in virtue of the *fact* but in virtue of the *desirability* of an increase or decrease in its values.) *Unclear indicators* are such that either (a) most people will not be willing or able to say whether bigger indicator-values indicate a better or worse state of affairs, e.g., welfare payments, or (b) there is serious disagreement about whether bigger indicator-values indicate a better or worse state of affairs, e.g., divorce rates. In the case of welfare payments, we do not know what to say because as the values increase there may be an increase of people in need of such assistance, which is bad; while, at the same time, there is an increase in the amount of assistance given, which is good. In the case of divorce rates, on the other hand, many people know exactly what they want to say, and they happen to disagree with what some other people want to say.

*Input indicators* indicate some sort of inputs into a process or product, e.g., numbers of people engaged in research and development. *Output indicators* indicate some sort of output of a process or product, e.g., numbers of articles published or patents awarded per 1000 people employed in research and development. Unlike the previous classifications of indicators, what counts as an input or output indicator depends on the purposes of the classification. For example, from the point of view of a teacher, the amount of time a student spends studying could be regarded as an output indicator measuring the effects of a student's own need for achievement as well as from advice, admonitions and threats given to the student. However, from the point of view of a student, time spent studying could be regarded as an input indicator measuring the necessary investment made in the interest of obtaining such important measurable outputs as university degrees, good jobs and higher income.

In some contexts it is useful to talk about *intermediate output indicators* (e.g., that measure the machines that make consumer products), *throughput indicators* (e.g., that measure choices people make for certain consumer goods) and *outcome indicators* (e.g., that measure longer-term net results of inputs), but there is no need to use these terms for our purposes.

When people use the phrase *quality of life*, they sometimes intend to contrast it with quantities or numbers of something. There are, then, two quite different sorts of things that one might want to refer to when using the phrase *quality of life*. In the first place, one might want to refer to sorts, types or kinds of things rather than to mere numbers of things. For example, one might want to know not merely how many people received bachelors degrees majoring in mathematics, but also what sorts of people they were, male or female, in public or private institutions, with or without scholarship aid, and so on. When the term *quality* in the phrase *quality of life* is used in this sense, one may say that it and the phrase in which it occurs is intended to be primarily *descriptive*.

In the second place, however, one might want to refer to the value or worth of things by using the term *quality* in the phrase *quality of life*. For example, one frequently hears of people making a trade-off between, say, a high salary on the one hand and better working or living conditions on the other. Presumably the

exchange here involves monetary and some other value. That is, one exchanges the value of a certain amount of money for the value of a certain set of working or living conditions. When the term *quality* in the phrase *quality of life* is used in this sense, one may say that it and the phrase in which it occurs is intended to be primarily *evaluative*.

Both senses of the phrase *quality of life* are important. It is important to be able to describe human existence in a fairly reliable and valid fashion, and it is important to be able to evaluate human existence in the same way. Today (2004) nearly everyone agrees that both kinds of measures should be used, although there is no agreement on exactly which and in what proportion. All of the kinds of indicators that might be referred to here are summarized in Exhibit 1, with examples of each.

As if things were not complicated enough, anyone constructing social indicators with the aim of integrating them into a social reporting or accounting system to monitor changes in the quality of people's lives will have to address the following 15 issues, which collectively yield over 200,000 possible combinations representing at least that many different kinds of systems. The issues are certainly not mutually exclusive and almost certainly not exhaustive. Options selected for one issue typically have implications for other issues, and it is likely that other researchers could identify other critical issues that I failed to notice. For a more detailed review of problems related to the combination of social, economic and environmental indicators (see Michalos, 1997).

1. *Settlement/aggregation area sizes*: e.g., the best size to understand air pollution may be different from the best size to understand crime.
2. *Time frames*: e.g., the optimal duration to understand resource depletion may be different from the optimal duration to understand the impact of sanitation changes.
3. *Population composition*: e.g., analyses by language, sex, age, education, ethnic background, income, etc. may reveal or conceal different things.
4. *Domains of life composition*: e.g., different domains like health, job, family life, housing, etc. give different views and suggest different agendas for action.

## Exhibit 1

## Types of Social Indicators for Health Domain

	Positive(P)	Negative(N)
Input(I)		
Objective(O)	IOP (e.g., daily exercise time)	ION (e.g., cigarettes smoked per day)
Subjective(S)	ISP (e.g., positive attitude toward exercise)	ISN (e.g., positive attitude toward smoking)
Output(U)		
Objective(O)	UOP (e.g., normal BMI score)	UON (e.g., stained fingers and teeth)
Subjective(S)	USP (e.g., satisfaction with weight)	USN (e.g., dissatisfaction with stains)

5. *Objective versus subjective indicators*: e.g., relatively subjective appraisals of housing and neighborhoods by actual dwellers may be very different from relatively objective appraisals by “experts”.
6. *Positive versus negative indicators*: negative indicators seem to be easier to craft for some domains, which may create a biased assessment, e.g., in the health domain measures of morbidity and mortality may crowd out positive measures of well-being.
7. *Input versus output indicators*: e.g., expenditures on teachers and school facilities may give a very different view of the quality of an education system from that based on student performance on standardized tests.
8. *Benefits and costs*: different measures of value or worth yield different overall evaluations as well as different evaluations for different people, e.g., the market value of child care is far below the personal, social or human value of having children well cared for.
9. *Measurement scales*: e.g., different measures of well-being provide different views of people’s well-being and relate differently to other measures.
10. *Report writers*: e.g., different stakeholders often have very different views about what is important to monitor and how to evaluate whatever is monitored.

11. *Report readers*: e.g., different target audiences need different reporting media and/or formats.
12. *Quality-of-life model*: e.g., once indicators are selected, they must be combined or aggregated somehow in order to get a coherent story or view.
13. *Distributions*: e.g., because average figures can conceal extraordinary and perhaps unacceptable variation, choices must be made about appropriate representations of distributions.
14. *Distance impacts*: e.g., people living in one place may access facilities (hospitals, schools, theatres, museums, libraries) in many other places at varying distances from their place of residence.
15. *Causal relations*: Prior to intervention, one must know what causes what, which requires relatively mainstream scientific research, which may not be available yet.

It should not be thought that the selection of the appropriate mix of options from each of the 15 critical issues is merely a technical problem to be solved by statisticians or information scientists. On the contrary, the construction of social indicators of the quality of life is essentially a political and philosophical exercise, and its ultimate success or failure depends on the negotiations involved in creating and disseminating the indicators, or the reports or accounts that use those indicators. Exhibit 2 lists 10 potential uses and abuses of social indicators. For every appropriate use of social indicators, social reports or social accounts, one can imagine a possible abuse, as indicated in the exhibit. A longer discussion may be found in Michalos (1980).

Combining objective and subjective indicators that might reveal something good or bad about the quality of people's lives yields four logically possible states of affairs. For ease of reference and with some exaggeration, I refer to the four cases in terms of Paradise and Hell. Here are the four possibilities.

1. Objective and subjective measures are good, i.e., the objectively measured features of people's lives are good and people also feel good about or are generally satisfied with their lives. This I call Real Paradise.
2. Objective measures are bad and subjective measures are good, i.e., the objectively measured features of people's lives are bad but

## Exhibit 2

## Uses and Abuses of Social Indicators

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**Social indicators:**

- (1) provide convenient numerical summaries of important features of society, but also encourage commission of The Number-Crunchers' Fallacy, which is this: Anything that cannot be counted is unimportant and anything that can be counted is important.
  - (2) can be used to predict and alter future behaviour, for better or worse depending on the nature of the behaviour and the alterations.
  - (3) can give visibility to problems, and also create them by focussing attention on them, or by hiding some in the interest of emphasizing others.
  - (4) can help obtain balanced assessments of conditions against mere economic assessments, and can distort appropriate assessments by assuming that everything valuable can be given a price in monetary terms.
  - (5) can help in the evaluation of current public policy and programs, and also contribute to perverse evaluations because the statistics routinely collected may not allow decision-makers to control for important contaminating variables when they are trying to decide what has caused what.
  - (6) can help determine alternatives and priorities, but also allow an elite corps of statisticians and other experts to unduly influence the public agenda by providing the "official version" of the state of the world.
  - (7) can facilitate comparisons among nations, regions, cities, other groups and service-providers, but also encourage invidious comparisons, raising aspirations and hopes too high or not high enough.
  - (8) can suggest areas for research to produce new scientific theories and more knowledge about the structures and functions of systems, but also retard action because people may be unwilling to act in the absence of a perfect theory or model.
  - (9) can provide an orderly and common framework for thinking about social systems and social change, perhaps so orderly and common that alternatives from different points of view might be perceived as unrealistic, unthinkable, totally radical and incredible merely because they are different.
  - (10) can stimulate thinking about new policies and programs, or stifle such thought as a result of massive "group-thinking".
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people still feel good about or are generally satisfied with their lives. This is the classic case of a Fool's Paradise.

3. Objective measures are good and subjective measures are bad, i.e., the objectively measured features of people's lives are good but people feel bad about or are generally dissatisfied with their lives. This I call a Fool's Hell.
4. Objective and subjective measures are bad, i.e., the objectively measured features of people's lives are bad and people feel bad about or are generally dissatisfied with their lives. This must be Real Hell.

Although I have never done any systematic research to determine the relative frequency with which average people believe themselves or others to live or prefer to live in any of these four circumstances, my impression is that some people would definitely prefer to live in a Fool's Paradise rather than in a Fool's Hell, while others would have exactly the opposite preference. In fact, I think it was precisely this difference of opinion that led some medical researchers to begin studying what is now called 'health-related quality of life'. Doctors found that some kinds of therapy might prolong patients' lives, although the patients found their lives to be relatively dissatisfying. In such circumstances, it is reasonable and morally right to ask: Should the objective measure (length of life) or the subjective measure (satisfaction with life) be given precedence in determining the overall quality of a patient's life? I have already said that most researchers think both kinds of measures should be used. I have not said and do not believe I have a good argument for everyone preferring a Fool's Hell to a Fool's Paradise or *vice versa*. I think that different people, in different circumstances, might have good reasons to prefer one or the other situation. What's more, I think that the roles of researchers, citizens, policy makers and friends are fairly similar in that what each role requires is that the role-holder cooperates and negotiates with those affected to decide which circumstances ought to lead to which judgments about what is preferable, i.e., about what ought morally and rationally to be preferred.

The question of how to evaluate indicator-values (Critical Issue #8) deserves special attention with regard to the four cases just sketched. Because there are many different general theories of value, including different ethical and esthetic theories (Michalos, 1980, 1981, 2001), there are many different criteria or standards that might be used to assess a particular indicator-value or a change in that value as good or bad. It is easy to say that the objectively measured features of people's lives are good, but it is not so easy to say exactly what this means and exactly how the good of one feature is to be compared, if at all, to the good of another. If an individual has a blood pressure indicator-value in the normal range then that is good in the sense of being highly correlated with good health, other things being equal. Similarly, if a society has a low crime rate then that is good in the sense that people are relatively secure, whether they feel secure or not, other

things being equal. But how does one compare the value of being secure with the value of being in good health, and with the value of feeling secure or feeling healthy? Many social indicators researchers seem content to interpret value in a naturalistic subjectivist way as a degree of satisfaction. So, to say that a low crime rate is good or that a normal blood pressure is good means roughly that each of these things generates a certain degree or amount of satisfaction for some society or some person, respectively. But many people have quite different views about the nature of value. Like the philosopher Moore (1903), they may say, "I know it is satisfying, but is it (morally) good?" or like the philosopher Mill (1861), they may say "It is better to be Socrates dissatisfied than a pig satisfied". Clearly, some very difficult questions lie unanswered regarding the evaluation of our objective and subjective indicators and indicator-values.

#### *Philosophical Foundations*

In this section I will give a very brief sketch of my understanding of the discipline of philosophy and of some of the contributions philosophers have made to our research field.

Generally speaking, philosophy may be defined in two ways. From a *functional* point of view, philosophy may be regarded as nothing more than critical or careful thinking about anything from baseball to mathematics or life itself. From a *formal* point of view, philosophy may be regarded as a body of knowledge answering three questions, namely, 'What is it?', 'What good is it?' and 'How do you know?'.

Answers to the question 'What is it?' give us an *ontology*, which comes from the two Greek words 'on' meaning being or nature and 'logy' meaning discourse. So, for example, if one is philosophizing about life, one could say an ontology of life would be discourse on the nature of life. At a minimum, an ontology of anything can be divided into formal and functional aspects. Just as a complete description (ontological account) of the nature of a frog would include a description of its anatomy and physiology, a complete description of anything else admits of structural and functional features. An ontology of life itself would include discussions of the morphology of living things and of their functions.

Answers to the question ‘What good is it?’ give us an *axiology*, which comes from the two Greek words ‘axion’ meaning value or worth in this context, and ‘logy’. So, an axiology of life would be discourse on the value or worth of life. More precisely, any feature of life identified in one’s ontological account would be assigned a value of some sort. Among types of values, the broadest distinction is between intrinsic and instrumental values. *Intrinsically valuable* things are things that are regarded as good in themselves or good as ends in themselves. *Instrumentally valuable* things are things that are regarded as good for obtaining other things or good as means of obtaining things that are regarded as intrinsically valuable. For example, life itself may be regarded as intrinsically valuable and good health may be regarded as a means to obtaining and maintaining life. Alternatively, good health may be regarded as an end in itself, and exercise as a means to achieving and maintaining that end.

Practically anything may have instrumental value for something, because people pursue many different kinds of ends by many different kinds of means. On the other hand, philosophers have spent a considerable amount of time trying to answer the question: Is there only one or more than one thing in the class of intrinsically valuable things? Those who believe there is more than one intrinsically valuable thing may be called *pluralists*, while those who believe there is only one intrinsically valuable thing may be called *monists*.

Different monists have suggested different candidates for the single intrinsically valuable thing, e.g., life itself, moral virtue, personal satisfaction, and happiness. For example, then, for a monist who believes that happiness is the single intrinsically valuable thing in the world, all other valuable things are at best instrumentally valuable, especially those whose immediate end is happiness. For such a person, solving mathematics puzzles, singing or performing brain surgery are activities that are regarded as good or valuable exactly insofar as they produce happiness. In other words, for such a monist, these activities have different degrees or amounts of value, but not different kinds of value, intrinsically speaking.

Most importantly, then, *in principle* the monist solves the most difficult problem of comparing the value of radically different (i.e., ontologically distinct) things like singing and performing brain surgery by conceptualizing these things as instruments for generating

some degree or amount of happiness. For the monist, in principle the value of everything is comparable to the value of everything else. Performing brain surgery is more valuable than singing if and only if the surgery produces more happiness (possibly in total, or for him- or herself, or for some select group) than singing. What's more, if one could measure precisely the happiness produced by surgery and singing, one could know precisely the size of the benefit produced by these activities. If one also had some measure of the costs of producing the surgery and singing, one could determine exactly the relative efficiency of resources put into producing each activity. A reasonable or rational person, then, would live his or her life such that the benefits of his or her activities would at least balance the costs.

Of course, it is one thing to solve a problem in principle and another to solve it in fact. While there have been and are plenty of monists or at least "wannabe" monists, there is no generally accepted theory of happiness, although there are a variety of relatively reliable and valid measures of happiness conceptualized in somewhat different ways (Michalos, 1991a). In principle, though not necessarily in fact, pluralists have a much harder time dealing with the problem of incomparable values. A pluralist might regard the value of brain surgery as radically different from the value of singing and the value of a person's life. Such a pluralist might argue, for example, that no matter how much or how well you sing, its value can never match that of the value of your life itself. That is, the values of singing and life are different in kind, not merely in degree. For such a pluralist, the value of everything would not be comparable to the value of everything else. Since there is also no generally accepted theory of pluralism with respect to intrinsic value, there is no way of knowing how many pluralists there are in the world and how many allegedly distinct kinds of intrinsically valuable things. For our purposes, it is enough to know that these fundamental axiological issues are part of the essential elements of philosophy. A fine review of philosophical theories of value may be found in Werkmeister (1970, 1973).

Answers to the question 'How do you know?' give us an *epistemology* or theory of knowledge, which comes from the two Greek words 'episteme' meaning knowledge and 'logy'. So, for example, an epistemology for a philosophy of life would define knowledge and

explain how one obtains knowledge, evaluates arguments and individual claims to knowledge, distinguishes knowledge from mere opinion, decides that certain propositions are within or beyond the scope of one's epistemological methods and assumptions. All of the more or less sophisticated scientific methods that people bring to bear in the field of social indicators research would be included in the epistemology of our subject.

Given this characterization of philosophy, one should not be surprised to learn that when philosophers began to think critically about life, the question of its value assumed a central role. In the first essay in a collection called *The Greeks and the Good Life* (Depew, 1980), Steven Smith captured perfectly the philosophical significance of research into the quality of life. He wrote,

What is it to live a good life? That we care about the answer to this question is not surprising. For if we choose to live rather than to die, we want our lives to be good ones. But we do not agree with one another as to what constitutes a good life. . . . Not only do we disagree with one another as to the nature of the good life; often we find that the answers we have given are unsatisfactory even for ourselves. . . . Yet we cannot let the matter rest, so long as we care about improving the quality of our lives. When we ask what it is to live a good life, we are concerned with what is, in many ways, the most important question of all (Smith, 1980).

The foundations of our problem may be traced back at least to Plato's *Republic* (c.360 B.C.E.). In that book Plato enquired into the nature of the good life for an individual and for a society. First, he noticed that a society in which individuals were constantly in conflict with each other would be relatively less attractive to inhabit as well as relatively weak in competition against societies in which individuals lived in harmony. Then, reasoning by analogy, he argued that an individual whose reason and passions were in harmony would be relatively happier (at peace, content, satisfied) with himself or herself as well as relatively stronger than those who were at war with themselves. Reflecting that old model of harmony, today one might say that people are happy when their heads and hearts are together, or that people who have it all together are happy.

Plato's student, Aristotle, generally accepted the view that the proper intrinsically valuable end for humans is happiness. However, he qualified and complicated it in several ways. Among other things, he said that "to be happy (eudaimon) is 'to live well and to do well'" (Tatarkiewicz, 1976, p. 4). Since living well and doing well are not just

attitudes, feelings, experiences or beliefs, any complete measure of a good or happy life for Aristotle would have required what we now call objective as well as subjective indicators. This is a more robust view of his conception of the good life, which is usually characterized merely as contemplation.

Smith (1980, pp. 21–27) sketched six views of “the good life”, which he characterized as follows.

1. *Maximum gratification of desire*. . . living well is primarily a matter of having whatever one wants to have and doing whatever one wants to do. . .
2. *dominant-end* views. . . one selects, from the wide array of human goods, one dominant end or cluster of ends, to be pursued to the relative exclusion of other ends. . .
3. *purpose in life* views. . . one’s life becomes a good one by contributing to an end that lies beyond it. . .
4. *living up to one’s major expectations*. . . Happiness on this view is largely a function of a cognitive judgment that the real conforms to a reasonable ideal. . .
5. *human flourishing*. . . One grows toward the good life by progressively actualizing one’s potential for full human functioning. . .
6. *satisfaction of need*. . . genuine needs are viewed as more or less objective demands of the organism. . . and to live well is to be relatively successful in meeting one’s needs.

While the first, fourth and sixth views posit the good life as an end or product, the second, third and fifth posit it as a process. Smith noted that the six views were not exhaustive of those available in the literature, and that most of the six might be called “organic or naturalistic models of what it is to live well”, in contrast to views calling for “rising above or conquering the demands of our organism, and achieving a higher state that has little to do with organic functioning” (Smith, 1980, p. 29). Smith was impressed with Maslow’s (1954) hierarchy of human needs and tended to see the fulfillment of needs as central to the good life. I believe there is abundant evidence in Michalos (1991a,b 1993a,b) indicating that perceived need-fulfillment is much less important to personal satisfaction and happiness than the fulfillment of desires (wants) and keeping up with significant others (social comparison). Since there does not seem to be any way to know what a person’s real potential or ultimate needs are, I

suspect that claims about the good life cast in terms of actualizing such potential or fulfilling such needs are essentially not testable, and therefore, simply metaphysical. Such claims are, of course, as old as Plato, and may even be true, but there does not seem to be any scientific way of finding out if they are true.

In a fine historical treatise on happiness, written by a Jewish philosopher in Warsaw during the Second World War, Tatariewicz (1976) provided a thorough review of the great variety of contradictory views offered by our most distinguished sages. Regarding the sources of happiness, among other things, Tatariewicz reported that while some philosophers said that happiness comes from living a virtuous life, others said it comes from living an evil life and getting away with it. While some said happiness comes from knowing the truth, others said it comes from believing in illusions. Some said it comes from making others happy, while others said it comes from realizing that nobody can make anybody else happy. Some said it comes from sharing our misery, while others said it comes from concealing our misery. Some said it can only be found in struggle, while others said it could only be found in tranquility. While some said it comes with love, others recommended abandoning all attachments. All together Tatariewicz identified about two dozen contradictory prescriptions for happiness, clearly demonstrating that different people conceptualize and find paths to happiness in different ways. In the light of this fact, it is probably more accurate to think about the nature of *a* good life or *some* good lives rather than *the* good life. Tatariewicz's own view was that

...happiness requires total satisfaction, that is *satisfaction with life as a whole*...Happiness is *to be satisfied with life as a whole*; on the other hand, satisfaction of this kind is impossible. It is so because our minds are incapable of comprehending the whole of our life (pp. 8–9).

About 2000 years after Plato and Aristotle, Bentham (1789) had the notion of constructing a 'felicific calculus' that would allow decision makers to calculate the net pleasure or pain connected to every action for everyone affected by that action, with public policy choices made to get the greatest net pleasure or least net pain for the greatest number of people. For economists, utility theory is the apparent heir of Bentham's calculus (Mitchell, 1918). Standard utility theory is built upon the monist assumption that the value of everything is

comparable to the value of everything else. As explained above, this is an empirically false assumption for many pluralists, but it is still an assumption that is routinely stipulated as an axiom or postulate of comparability in standard utility theory (Michalos, 1967). Utility theory is formally elegant and has been an enormously fruitful source of research programs in individual and group decision making related to commercial markets, social and political relations, bargaining, conflict resolution, gaming and scarce resource allocation in practically all areas, including health (Nussbaum and Sen, 1993; Torrance, 1986). It is the heart of micro economics. Unfortunately, utility theory (as many other theories) is much better on paper and in classroom exercises than it is in practice, especially in public policy making. What is worse, utility theory begins with revealed preferences which are the mere tips of socially, psychologically and pragmatically constructed icebergs of more or less coherent systems of knowledge, opinions, attitudes, desires and needs (Michalos, 1967, 1978, 1985; Schwarz and Strack, 1999).

If degree, amount or level of happiness is regarded as the final measure of the value of life, of life's quality evaluatively speaking or of a good life, then something like Bentham's principle would be a plausible place to begin. As explained above, I believe the final measure of the quality of life is more complicated than happiness (which, contrary to Bentham, I think is itself more complicated than balancing experienced pleasures and pains), and it requires some mix of measures of living well and doing well, i.e., it requires some mix of objective and subjective indicators. However, I also think that Bentham's notion of a 'felicific calculus' was a spectacularly fruitful seed of many scientific and philosophical research programs. There is a fairly long and illustrious line of philosophers and social scientists who seem to have followed Bentham in one way or another, beginning with Mill (1861) and Marshall (1861), and carried forward in the naturalistic subjectivist tradition of the American pragmatists, especially James (1909), Perry (1926, 1954), Dewey (1939) and Lewis (1946). Most recently, Kahneman (1999) seems to be writing in that tradition. Since the tradition has been around for a long time, there is no need to review its strengths and weaknesses here. (See Michalos, 1984 for an overview.) From this broadly pragmatic, consequentialist or utilitarian point of view, the quality of a person's or community's life, in an evaluative sense, is directly proportionate

to the net levels of happiness or satisfaction generated by that life for everyone affected by it. As James put it in an essay first published in 1891,

That act must be the best act...which makes for the *best whole*, in the sense of awakening the least sum of dissatisfactions. In the casuistic scale, therefore, those ideals must be written highest which prevail at the least cost, or by whose realization the least possible number of other ideals are destroyed. ...The course of history is nothing but the story of men's struggles from generation to generation to find the more and more inclusive order (James, 1977, p. 623).

Besides the vast speculative literature produced by philosophers on the nature of a good life, there is an extensive historical and sociological literature dealing with a variety of utopian communities that achieved some level of real existence. A fine overview of utopian philosophies in general and utopian communities in particular may be found in Richter (1971). In the Preface of his book, Richter (1971, p. ix) explained its origin and reason for being.

Today's students need little professional prodding to ask many of the questions which have always interested social and moral philosophers. What is the best kind of life? How can it be achieved? ...Is a utopia or a perfect society possible? If it is, is it desirable? ...The study of utopias is not intended to encourage students to escape from the unpleasant social realities or merely to build castles in the air, but rather to help them to develop standards by which to judge actual society and to improve the quality of life in the present-day world.

Early in the volume, readers are alerted to the central tendencies and variety of utopian visions, in ways that might be expected by readers of the earlier parts of this essay.

Depending upon how it is conceived, utopia can appeal to the most base and the most elevated aspects of human nature. An ideal society is naturally expected to guarantee food, shelter, and clothing, as well as protection against fear and insecurity. It can hold out the promise of perpetual contentment. It can insure against frustration and boredom by providing in their proper proportion tranquility and adventure. For many the dream of utopia can offer a change which cannot help but be for the better. For the enraged, it offers an outlet; for the alienated, a hope of reconciliation; for the exhausted, a hope of renewal; for the simple-minded a panacea; for the fanatical, an only solution. For men who live lives of quiet desperation, the utopian vision can give assurance that their puny lives have a higher significance; that more harmonious relationships with their fellowmen are desirable and feasible; and that cooperative effort and continuous sacrifice are worthwhile for the noblest human purposes, the building of heaven on earth (Richter, 1971, p. 2).

The Shaker community was described as "the most successful communitarian experiment in American history", flourishing roughly

in the period from 1840 to 1850. Their founding principles included the “common possession of property”, “celibacy”, “nonresistance to evil”, “separation from the world” and “power over physical disease”. They seemed to live long and “quite happy lives, although the Shaker goal was not happiness but spiritual perfection” (Richter 1971, p. 88). Similarly, the Unitarian founders of Brook Farm in the 1840s in Massachusetts did not aim for happiness. As one of the community’s leaders wrote,

Our ulterior aim is nothing less than Heaven on Earth, – the conversion of this globe, now exhaling pestilential vapors and possessed by unnatural climates, into the abode of beauty and health, and the restitution to Humanity of the Divine Image, now so long lost and forgotten (Charles A. Dana, as quoted in Richter, 1971, p. 118).

Richter’s volume includes essays by anti-utopians. For example, Walsh (1962) was troubled by the possibility of social well-being undermining individual well-being, and happiness becoming deadly dull. In his words,

Society is by its nature more coarse-grained than many of its members. The individual who seeks his fulfillment by being a bee in the hive must give up the nuances of his nature. . . The dystopian. . . asserts that too much emphasis on the well-being of society can lead to a world in which the collective whole is flourishing but not a single one of the automata inhabiting it is capable of happiness. . . Dystopia emphasizes the perverseness of men, their restlessness, their ability to grow weary of a flat and virtuous contentment. . . He is not so sure that the bland happiness of utopia is enough. If he had to choose, he might opt for more agony and more ecstasy (Walsh as quoted in Richter, 1971, pp. 228–229).

This sort of dystopian seems to be the sort that might be attracted to the so-called contented cow theory regarding happy people. According to this theory, happy people tend to be lazy and lose their creative drive, which leads directly to the deterioration in their own and their community’s overall quality of life. Happily, this theory was pretty thoroughly demolished in Veenhoven (1989).

A review of philosophical contributions to the foundations of quality of life measurement should include some mention of the literature concerned with individual and group decision-making. In the simplest case, we may imagine an individual faced with a choice between two possible courses of action or two hypotheses, in the presence of some initial conditions. For example, a policy maker can adopt a policy of lowering taxes across the board or not, knowing

that most people will appreciate lowered taxes or not. Then the policy maker has to imagine the likely consequences, including the value of those consequences, in the event that the policy of lowering taxes is adopted and most people appreciate it, or the policy is adopted and most people do not appreciate it, or the policy is not adopted and most people appreciate it, or the policy is not adopted and most people do not appreciate it. Starting with this simple beginning, one might complicate the situation by adding information about the probabilities of people's appreciation, their levels of appreciation, their reactions to the introduction of certain policies, the policy maker's own reactions to their reactions, and so on. If one introduces more policy makers, with their own assessments and values, the situation becomes still more complicated. Clearly, these are precisely the sorts of complications that social indicators researchers face, and philosophers have contributed to articulating the issues and providing solutions through studies already mentioned as well as through studies of the logical foundations of probability theory, decision and game theory, voting theory and welfare economics, e.g., (see Black, 1963; Buchanan and Tullock, 1962; Carnap, 1950; Edwards and Tversky, 1967; Fishburn, 1973; Michalos, 1971, 1978; Rothenberg, 1961; Simon, 1957; Todhunter 1949).

Finally, our review should mention the literature around moral and political issues related to the proper role of governments in providing a good life and public goods. A good review of the issues may be found in den Hartogh (2000). Public goods may be distinguished from private goods on the basis of either of two characteristics, namely, jointness and nonexclusiveness (Olson, 1965, 1969). To say that a good is characterized by *jointness* is roughly to say that using it does not imply using it up. To say that a good is characterized by *nonexclusiveness* is roughly to say that nonpurchasers cannot be excluded from enjoying it. Information is a perfect example of a public good displaying the character of jointness, and clean air or national security are examples of public goods displaying nonexclusiveness. The fundamental problem concerning the provision of public goods is often referred to as the free-rider problem (McKean, 1974). Because, without taking special measures, no one in a society can be excluded from public goods displaying nonexclusiveness, there is a temptation for hypothetically self-serving citizens to try to pass the costs of such goods on to everyone else. To prevent such

free-riding, governments may use coercion backed by legal sanctions, as well as rational or moral persuasion.

According to den Hartogh (2000a, p. vii), “the neutrality thesis” says that “in designing state policies governments should not allow themselves to be informed by any particular conception of the good life”. Insofar as governments do allow themselves to be thus informed, they are engaged in what political philosophers call “perfectionist” policy making. Between strict neutrality and perfectionism, a state may initiate policies that are slightly perfectionist, called “pale perfectionism” by den Hartogh. In his view, because some public goods imply particular forms or at least features of the good life, the neutrality thesis cannot be plausibly maintained. I suspect that most social indicators researchers would agree, since we begin with the assumption that it is both reasonable and morally right for governments to try to improve the quality of people’s lives, and such improvement presupposes some notion of what a good life might look like.

Den Hartogh holds a pluralist view on the nature of intrinsically valuable things, and his list of “intrinsic goods” includes “national identity”, ‘avant-garde art”, “sustainable development”, certain forms of “minority culture”, “living together with mentally handicapped people”, “a moral and intellectual climate of mutual respect” and a “liberal culture as a forum for free discussion” (p. 23). Beyond these, he even asserts that

The humdrum perfectionism of day-to-day politics...does not only apply to non-excludable goods...as soon as we decide to use collective funds to provide some additional goods in kind, e.g., education, health care insurance, housing, or methadone, our problems of specification and weighing return.

Of course they do. For why should we take these goods from the exchange circuit to begin with? ...it seems that we are not only interested in providing people with the conditions of autonomy [so they can choose anything they like for their own self-conceived good life]; we also want them to be minimally educated, healthy, free from pain, self-respecting, etc., because these things themselves belong to the good life, on an equal footing with autonomy (den Hartogh, 2000a, p. 24).

Although he generally uses the persuasive “we”, writing about what “we” want, like or would accept, without actually asking for anyone’s opinion in any systematic way, a lot of what he says strikes me as reasonable. As a pluralist, he recognizes that it might appear as if a “Herculean theory” would be required to properly assign priorities among the diverse intrinsically and instrumentally valuable

things “in a principled but neutral way”. But he thought that such a theory would not be required.

Day-to-day politics is not a matter of applying an all-embracing but neutral ‘theory of justice’ to particular cases. It is an ongoing debate and bargaining process between adherents of different, though partially overlapping, conceptions of the good life, who are nevertheless pledged to remain within the bounds of a single solution procedure [i.e., democratic decision making among people assumed equally worthy of respect as persons]. Only the *design* of the procedure is neutral (den Hartogh, 2000a, p. 27).

It seems to me that any reasonable review of the past couple 1000 years of philosophic reflections on the nature and value of democratic decision making would make it extremely difficult to believe that those reflections are not thoroughly informed by notions of many kinds of good lives. Since practically everyone knows that majorities can make bad decisions and the mere fact that most people agree is not a sufficient condition of its being correct, smart, morally right or good, those who insist on democratic decision making in some form probably hold such an ideal as part of their notion of a good life, politically speaking. Indeed, I suspect that many philosophers would probably find themselves agreeing with Dewey (1958) when he argued that one ought to support liberal education for everyone because liberally educated people make the best citizens for a democracy and we ought to support democracy because it is the best form of government for liberally educated citizens. That is, I suspect that the notions of democracy, liberal education, autonomy and a good life are inextricably connected such that if all the implied connections were revealed, one would find oneself in the position of Wittgenstein’s (1922) philosopher who builds his conceptual castle, climbs into it and then pulls the ladder up afterward. At some point, philosophical analysis must end, and often the end of a thorough analysis completes a circle of reasoning that is hopefully virtuous, but is possibly vicious.

#### HISTORY OF QOL STUDIES FROM A SOCIOLOGICAL PERSPECTIVE (ABBOTT L. FERRISS)<sup>1</sup>

Sociologists study social systems. In sociological use, a social system may be a group, family, society, community, world system or other

organized program of interaction. Sociology also considers social categories as elements of social systems, such as race, gender, ethnicity, religion, age, region, and other categories. Sociologists often study the structure of the social system and its changes over time in response to social forces, such as cooperation, competition, conflict, etc. The aim of sociology is to understand the workings of a social system so that its future state or behavior may be predicted. For this purpose, where statistical data are available, social indicators are employed to trace changes over time, to monitor the social system, to evaluate interventions and to forecast the future. Social indicators are elements of models of social systems (Johnson, 2002; Land, 2000).

QOL refers to well being as indicated by subjective indicators and/or objective indicators. Our purpose here is to describe the use made of the QOL concept in sociological research, tracing its development. However, QOL is an interdisciplinary concept. Therefore, no attempt is made to isolate only sociological contributions to QOL developments. QOL study arose within the movement to advance the use of social indicators in research and in informing public policy. Consequently, I begin by tracing the landmarks in the development of social indicators, chiefly in the United States.

#### *Early Developments in Social Indicators Research*

The social indicator “movement” involves not only statistical time series but also social reports that analyze trends and interconnections of social forces. In the U. S. two conceptual precursors of the movement were *Recent Social Trends in the United States* (Ogburn, 1933) and *Southern Regions of the United States* (Odum, 1936). Two chiefly economic social reports followed, but social indicators did not gain intellectual stature until the 1960s. The National Aeronautics and Space Administration (NASA), with guidance from an associate director who was a sociologist, supported the work of a National Commission on Technology, Automation, and Economic Progress, which recommended measurement of social costs and returns of innovation, social ills, the creation of “performance budgets” of social needs, such as housing, education and welfare, and development of measures of economic opportunity and social mobility (National Commission on Technology, Automation and Economic Progress, 1966). NASA also supported the development of *Social Indicators*

(Bauer, 1966), which through essays by Bauer, Biderman (a sociologist), Gross, Rosenthal and Weiss (a sociologist), explored the potential of social indicator developments.

Broad significance was given to the “movement” by Moore and Sheldon (1965), two sociologists with the Russell Sage Foundation, who called for understanding “large scale structural change in American society” and the collection and analysis of new and better data so as to monitor indicators of “structural alterations” and to use “such information for entry into the system, to alter the magnitudes, speed, and even direction of change in terms of explicit, normative criteria...” (p. 144). Thus, the desire to improve well-being through statistical measurement, intervention and monitoring were motivating forces of the “movement.” (Sheldon and Moore, 1966).

With this encouragement, the Federal Government set up a Panel on Social Indicators with Daniel Bell, a sociologist of Columbia University, and economist Alice M. Rivlin, an Assistant Secretary of the Department of Health Education and Welfare (DHEW), co-chairs. Academics, including a number of sociologists, economists and political scientists, and government social scientists assembled data to produce *Toward a Social Report* (Panel on Social Indicators, DHEW, 1969). The coordinator, Mancur Olson, an economist, pointed out in an introduction the inadequacy of economic indicators, such as the GDP, to reflect the well being of the Nation. Indicators are needed, he said, to inform public policy respecting social problems and to provide “insight into how different measures of national well-being are changing” so as to make better evaluation of effects of public programs (pp. xii–xiii). Well-being and welfare considerations were prominent in chapters on Health and Illness, Social Mobility, Income and Poverty, Public Order and Safety, Learning, Science and Art, Participation and Alienation. An Appendix decried the lack of a general, aggregate indicator of well being, pointing to the need for summary measures of the several components of well being. “The trouble is that ‘weights’ needed for aggregate indexes of other social statistics are not available, except within particular and limited areas” (p. 99) (Bell, 1969; Olson, 1969).

The Federal Government then launched a program to produce chart books of indicators in time series, topically arranged, with scant interpretation and little policy implication of the data (U. S. Office of Management and Budget, 1974 and 1977, and U. S. Bureau of the

Census, 1981). The first was compiled by an economist and the next two by a sociologist, Dennis F. Johnston. Compensation for the lack of interpretation was made through essays in issues of *The Annals* (Gross, 1967; Gross and Springer, 1970; Taeuber, 1978).

The government's interest in this chart book pathway abated, and Federal agencies began to publish indicator reports by sector, often with interpretation and discussion of program and policy implications. In annual or biennial series, the following appeared: *Science Indicators* (National Science Foundation), *Health USA* (U. S. Department of Health and Human Services), *Educational Indicators*, *Youth Indicators* and *The Condition of Education* (U. S. Department of Education), *Aging America* (U. S. Department of Health and Human Services), *The Sourcebook of Criminal Justice Statistics* and *Criminal Victimization in the United States* (U. S. Department of Justice), *Indicators of Housing and Neighborhood Quality* (U. S. Bureau of the Census), *Humanities Deskbook* (Office of Planning and Budget, National Endowment for the Humanities), and others. Simultaneously, the U. S. Bureau of the Census continued and expanded its series of Current Population Reports that detail trends in household and family, income, occupation, blacks, Hispanics, children and youth, educational enrollment and attainment, the elderly, fertility, voting, unemployment and others (Ferriss, 1979, 1989). Later, on April 28, 1988 Congress passed Public Law 100-297, requiring that educational indicators be reported annually. An original aim of early social indicator scholars was to bring about improvement in data. A committee of the Social Science Research Council and other groups advocated the need for better periodic surveys of general social trends and crime. The General Social Survey, conducted by NORC, was initiated with support from the National Science Foundation in 1972. The U. S. Bureau of the Census initiated a Victimization Survey and a Survey of Income and Program Participation (Rockwell et al., 1983).

In summary, the 1960s saw the beginnings and vigorous promise for the use of social indicators. In the 1970s research and publications flourished, stimulated by support of the Social Science Research Council (SSRC), the Russell Sage Foundation and the National Science Foundation (NSF). In 1972 SSRC established the Center for the Coordination of Research on Social Indicators (Land, 2000; Rockwell et al., 1983). In the 1980s a more conservative Federal

administration was less interested in the promise of social indicators. NSF curtailed its funding. The Center for the Coordination of Research on Social Indicators was discontinued. Pessimistic social scientists groused that the social indicators “movement” was dead (Andrews, 1989). Emphasizing international Social Indicator (SI) interests, Miles (1985) discusses SI developments in Second and Third World countries and related influences on the movement.

Publication of social indicator and quality of life research began in earnest in 1974, with volume 1, number 1, of *Social Indicators Research*, under editorship of Alex Michalos. During the course of its life, the Center for the Coordination of Research on Social Indicators published *Social Indicators Newsletter* and the American Institute for Research published for several years a newsletter on social indicators, devoted largely to educational indicators. Both were discontinued about 1982. With start-up support from SSRC, *The Social Indicator Network News (SINET)* began publication in November 1984, providing a medium for researchers to communicate about on-going SI and QOL research. Health-related quality of life studies were benefited by releases from the *Bibliography on Health Indexes*, issued quarterly by the Clearinghouse on Health Indexes, U. S. National Center for Health Statistics. The first issue (that we have located) covered the period, October 1973 to December 1974, and was published in 1975. These publications have shown the vitality of social indicator and QOL studies.

#### *Early Developments in QOL Research*

Measures of the conditions of living of families have been a concern of American sociologists since about 1918 (Sewell, 1940). Socio-economic status, level-of-living, and social status were labels applied to composite measures of families' living conditions. The term “QOL” was not then used.

Chapin (1922) devised a scale for rating families for use by social welfare workers. It was based upon a checklist of items to be observed in the living room of a house. Weights were assigned for the presence or absence of various common household items, such as large rug (6 points), light (electric, 12; kerosene, -3), sewing machine (2), telephone (24), alarm clock (-5), and weights were assigned to the interviewer's impressions of aesthetic features of the room, such as

cleanliness, orderliness, condition of repair, and impression of good taste. Summation of the weights enabled a classification of families as “destitute, relief cases-poverty, workingmen’s homes, lower middle class, average middle class, upper middle class.” It was a combination of level of living and social status measures.

A second notable system was developed by Sewell (1940) with a scale of the level of living of Oklahoma farm families. Observations were made of aspects of the house, with weights to enable classification of levels of status. In this paper, also, Sewell reviews earlier efforts of rural sociologists and others to distinguish the conditions of living of families.

McKain (1939) reviewed the rural plane of living concept, saying it could be constructed from census data, such as value of farm dwellings, access to electricity, running water, telephone, automobile, and radio in home. Weighting, he said, might be done by assigning equal weights or according to the amount of intercorrelation between the items. (Recall that in the 1930s techniques for scaling were primitive. Statistician Hotelling, psychologists Wherry, Thurstone-Horst, and others, and sociologist Hagood had begun the application of more sophisticated scaling methods but they were not then common coinage).

Cottam (1941) investigated level of living, social participation and adjustment of Ohio farm families. The objective was to delineate subregions of Ohio rural counties (Lively and Almack, 1938). Hagood employed their data, applying factor analysis to delineate the Ohio subregions. She used the first factor loadings as weights (Hagood et al., 1941). The composite index for the 88 Ohio counties included farm income, rural fertility, plane of living, and latitude and longitude. The latter values were used to delineate the proximity of counties to compose subregions. Hagood also developed indices with census data to delineate sub-regions of the Southeast (Odum, 1936, pp. 153–173). In the early 1940s Hagood joined the U. S. Department of Agriculture in Washington and proceeded to construct level of living indices of the rural farm populations of counties in the U. S.

In 1942, Cottam and Mangus (1942) published a QOL paper, naming the phenomena “standard of living.” It consisted of three major components: level of living, social participation, and social adjustment. These components were prominent in the research of

Ohio rural sociologist in the early 1940s. They drew upon Sewell's work in Oklahoma. With a five-point satisfaction scale, they identified satisfaction with the respondent's education, communication, economic security, housing, sanitation and safety, and electrical conveniences. Satisfaction with their level of living includes living conditions, community services, social-recreational, health, farm and farming, home and family, and neighborhood. There were 292 families in the study chosen from the several sub-regions of Ohio.

In 1985 Schussler and Fisher published an extensive review of QOL research in sociology (1985). They found that the report of the President's Commission on National Goals (1960) and *Social Indicators* (Bauer, 1966) gave impetus to research on the QOL. *Sociological Abstracts*, they report, first used QOL as a category of sociological research in 1979. However, they point out that concern with the good life, under other rubrics, such as "happiness," has been for long a sociological interest. They describe as developments in scale construction of QOL the measures of satisfaction with several domains of life, as developed by Campbell and associates (1976), and the objective scales developed by Liu (1976). They cite a number of QOL studies that relate QOL to socio-economic status, social participation, income, education, women working, religious commitment, marital status, etc. (pp. 136–137). Schussler and Fisher also review several studies of "community standard of living and found variation in satisfaction among less economically developed counties. Satisfaction with health was the chief difference between less economically developed and better counties. They also report lower life satisfaction in urban than rural residents (pp. 137–138). Schussler and Fisher found that studies using subjective indicators had produced a consistent body of results but the findings were of little use to policy makers. They anticipate that future studies would link QOL to the "larger social structure and the international processes that engender a sense of QOL" (p. 140). They conclude: "First, concern with quality of life intensifies in proportion as less time and energy are required to meet the basic necessities of living. Second, solutions for improving QOL differ from one group to another according to their emphasis on changing the individual or changing the system" (pp. 140–141). Schussler and Fisher finally summarize criticisms of QOL research, criticisms that QOL researchers had advanced of their own work. With the criticisms, the authors also present rebuttals.

Elihu M. Gerson (1976) also has reviewed the QOL concept with particular reference to health-related QOL. He presents the position that “sociological perspectives have some contribution to make to the general effort at preserving life, ensuring liberty and aiding the pursuit of happiness” (p. 794). The individual approach to defining QOL “stresses the achievements of individuals” while the transcendental approach stresses “the primacy of the community over the individual.” For philosophical and political reasons he rejected these two approaches as inadequate, holding that they do not define QOL in “self-consistent terms, nor do they specify the organization of society which will best ensure the highest QOL... “ (p. 796). He then proposes a new approach. Assuming a mutual dependence between the individual and society, he acknowledges the “constraining and enriching nature of any commitment”, and advanced the concept that sovereignty as “the net balance of resources and constraints available to a person, organization...across the full range of settings in which he (or she, or it) participates” (p. 798). He suggests that “patterns of commitment be measured as the joint allocation of money, time, skill and sentiment by individuals and settings”(p. 793). He illustrates this theoretical framework with the example of chronic illness and morbidity. Money, time, sentiment, and skill are involved in contributing to the QOL of the patient. Gerson poses a number of questions to be answered in defining the setting and the condition of the patient. He proposes that his theoretical approach applies to any QOL setting.

By volume of research contributions, health-related QOL studies exceed all other topics. Fitzpatrick (1996) reports that during the two years, 1988–1990 some 1400 articles were published. This compares with 200 articles published ten years earlier during 1978–1980. He and Gary Albrecht have contributed to this subject through Volume V of *Advances in Medical Sociology* under the title, *Quality of Life in Health Care* (Albrecht and Fitzpatrick, 1994).

#### *Reference Books and QOL*

The QOL concept is used in sociology, but it is not in common use. Apparently a few sociologists have recognized it as of value to sociology while most others either are unaware of it as a viable

concept or know of it and have rejected it in favor of more familiar terms. The following supports this:

The *Blackwell Dictionary of Sociology*, second edition, defines a number of terms closely aligned with QOL but it does not include QOL, subjective well-being, happiness, social indicators, well-being, nor does it include biographies of prominent persons in the social indicator movement. On the other hand, a number of terms related to QOL are included: stratification and inequality, social inequality, wealth and income, poverty, socioeconomic status, and others (Johnson, 2002).

A Spanish dictionary of sociology makes no reference to QOL (Giner, 1998). However, the *Encyclopedia of Sociology* includes QOL (Markides, 2000). Markides traces some of the important landmarks in social indicator and QOL developments. He mentions President Eisenhower's 1960 Commission on National Goals, Bauer's (1966) contribution; he mentions that in 1964 Lyndon Johnson pointed out that the Great Society was to ensure chances "to pursue their individual happiness." The Russell Sage Foundation promoted QOL in the 1960s and 1970s. Markides mentions the work of the Survey Research Center, University of Michigan, and he notes that *Sociological Abstracts* began classifying and abstracting QOL articles in 1979. The article also points to the 1976 publication by Russell Sage of *Social Indicators and Well Being: America's Perception of Life Quality*. He points out that health-related QOL research accelerated in North America and Europe in the 1980s. He recognized that the QOL concept has a cross-disciplinary character, not being the property of any one discipline, but is advanced through studies by psychologists, sociologists, economists, social workers, and others. QOL research he acknowledges "seems very much outside the mainstream of sociology" (p. 2307).

#### *The QOL Concept in Sociology Is not Yet Considered Mainstream*

While sociologists have not produced a large amount of research in the name of QOL, they have made contributions to understanding social system effects upon elements of the QOL, such as social structure, crime, education, inequality, etc. For example, the decrease in crime in recent years may be partly attributed to smaller cohorts of

males aged 18–29, the age group within which crime is greater. The change in this structural feature and its effect upon crime has been demonstrated by (Nagin and Land, 1993). Structural change, also, has affected the QOL of the family. Single parent families have increased and women heads of households with children are more likely to live below the poverty line (Hernandez, 1993). Another example is the effect of technological innovations upon work organization and job satisfaction (Caplow et al., 1991).

*Sociological Abstracts* is a useful source of references to current publications of sociologists. The February 2003 issue (vol. 51, no. 1) listed 15 abstracts of articles on QOL and volume 1, no. 2, listed 21 articles on the QOL. The June 2003 issue listed 18 QOL studies. These listings provide evidence that QOL studies are alive in sociological research, even though the topic plays a minor role.

Three issues of *Sociological Inquiry*, volume 73, for 2003 present no QOL articles. Four issues of *Sociological Forum*, volume 73 for 2002, include 43 articles, but none address QOL. However, the same issues present articles on inequality, gender differences, race/ethnic trends, racial inequality, inequality of single mothers, and other articles addressing topics with impact upon QOL.

The *Sociology of Health and Illness*, volume 51, five issues of 2003, includes no QOL articles. The four issues of Volume 81 of *Social Forces* address concerns closely related to QOL, such as the well-being of offspring as affected by parent-child relations, gender differences in the quality of free time, racial inequality, the measurement of poverty, women's employment and their happiness, and segregation and educational attainment. These articles speak directly to the causes and consequences of QOL.

Textbook writers for general sociology courses include the mainstream findings of the discipline, major orientations and theories. Undergraduates, thus, receive an overview of the entire field. We examined a dozen or more introductory sociology textbooks currently in use, many of them in fourth or fifth editions. The textbook writers do not include QOL. While QOL *per se* is not a term introduced in introductory sociology texts, treatment of the components of QOL everywhere is evident. Liberally treated are inequality, social stratification, poverty, infant mortality, life course changes, the standard of living, study of the life conditions of special categories such as children, aged persons, females, racial and ethnic groups, etc.

One reason for the lack of QOL in introductory textbooks is that there are few findings of empirical studies that have employed the term QOL. Prominent in sociological studies is the process of the generation-to-generation flow of status attainment. This has implications for the attainment of a QOL (Breiger, 1995). Status attainment is affected by the changing structure of occupations in the system. Opportunities for status attainment, also, are affected by the presence or absence of agencies that effect mobility, such as educational agencies, labor unions, churches, and others. Restraints upon migration may also affect status attainment. These instruments of screening and sorting affect mobility and the resulting QOL.

We also examined sociological journals. The story is the same: few or no mention of QOL, *per se*, but frequent articles addressing components of the QOL. The term, *social quality*, has been introduced into the lexicon of European sociological studies. It is a social, rather than individual, concept, and has been identified as consisting of socio-economic security, social inclusion, social cohesion, and empowerment (Fairweather, 2001). The general idea is to improve the social system in order to achieve better QOL for the individual and family.

Scholars have pointed out that values are central in QOL research. Yet, few studies have related values to QOL conditions. Hechter (2000) argues for the improvement of measures of values. Social outcomes, he says, “depend upon the values, or motives, that lurk behind our actions.” There is evidence that the basic values in the U. S. remain relatively stable (Caplow et al., 1991 pp. 555–565). Yankelovich (1981), the pollster, however, senses a shift from the ethic of sacrifice for others to one of self-fulfillment. Values, also, figured in the research of Mukherjee (1989). His *Quality of Life: Valuation in Social Research* contrasts an “elite perspective” (“what do people need?”) with a “mass perspective” (“what do people want?”). He employed open-ended questions in surveys in India. The questions included “what do you want most in life?” and related questions, “lack most in life,” “if you could receive a boon, what would you ask for?” and “what detest most in life?” and so forth. Aspiration for a better QOL, he found, rests upon past experiences and one’s current situation. Awareness of the possible QOL is essential for expectations to be generated. Expectations are affected by social processes and influenced by actions of the elite segment of society. Awareness, aspiration and orientation vary between apathy

for a better QOL to satiety in fulfillment (p. 147). In four samples in India, Mukherjee found a lack of aspiration for a better QOL to vary from 2 to 9%, and a vacillating (don't know) position for a better QOL from 9 to 28%. He imputes some of this variability to previous political actions in India. He found value to be "multilateral and multidimensional," and said it should be so appraised in QOL research. He concluded that valuation is the crux of social science research on QOL (p. 234).

Work related QOL has been a topic of continuing interest of sociologists, although not always under the QOL label. Sociologist Gallie (1996) has reviewed these contributions, going back to the Marxian hypothesis of the French sociologist Georges Friedman that mechanization has dispirited work. Subjective well being at work, he says, is affected by social support at work, the characteristics of the task, and the extent to which the worker participates in decision-making affecting the work. He finds no clear trend in work satisfaction over time and he emphasizes the need for improvement in measurement.

Another approach involving work and leisure as well is the application of time-use studies and what are termed "process benefits." Sociologist Gershuny and Halpin (1996) have shown that the "process benefit" approach attempts to identify the satisfaction derived from daily activities. In their study in Britain they detect progress in satisfaction between the 1960s and the 1980s. Enjoyment of activities in relation to their preference for them and time spent on them produces comparisons by age, hours of paid work, employment status, social class, sex, and child status. Those who enjoy their jobs are happier, generally. The British data show a strong association between spouses' well being and the happiness of the respondent. QOL researchers use income as an objective element in QOL scales. Income inequality varies by nation. Firebaugh (2000) has estimated that the average income in richest nations is 30 times greater than in the poorest nations. He attributes the difference to the unequal participation in industrialization and its creation of wealth. Firebaugh sees a polarization wherein the rich nations remain rich while the poorer nations struggle. Population increase induces a decrease in per capita income. With income as the indicator, he foresees a continuing stability of the disparity between nations. These criticisms imply a continuing depressed QOL of poorest nations.

Income inequality in the U. S. is addressed by O'Connor (2000). After pointing out the well-known inequality wherein the rich have increased their share of income while the poor have lost ground, she points out that economic growth has not reduced poverty. The poverty problem is redefined by the quality and distribution of jobs, by economic restructuring, and by the working poor whose income is inadequate. She holds that the trend of greater income inequality implies a reduction in the QOL of middle and lower classes. Also implied is an increase in "economic insecurity and social marginality" (p. 557).

In a wide-ranging review of poverty studies, Tickamyer and Duncan (1990) refer to types of poverty persons (disabled, elderly, those trapped in chronic poverty areas) and demonstrate that social structure, with limited opportunities for upward mobility, reinforces poverty and underemployment. They cite landlessness as a basis for rural poverty in the South. Furthermore, a structural change in the composition of the family characterized by an increase in single parent households has depressed the well being of children (McLanahan, 2000).

#### *Sociological Theory and QOL*

Most sociological research is guided by theory. When there is a theory of the QOL, the concept will gain as a topic of sociological study. At present, aspects of the QOL are the subject of theory and are prominent in research, but not the QOL concept as a whole. For example, the neo-Malthusian theory of demographic change holds that when population increases beyond the capacity of the system to provide jobs and subsistence (originally, "the food supply"), starvation and want ensue. The increase in mortality reduces the size of the population so that it comes into adjustment with the "food supply." Thus, the dynamics of demographic change affects the QOL. Another example reflects the poverty status of the population. This hypothesis holds that if the size of economic enterprises increases, thereby decreasing the number of enterprises, the poverty status is adversely affected. This refers to enterprises such as retail stores, size of farms, size of manufacturing plants, and the like. Smaller is better, in this case.

Generally, theories concern the evolution of the social system, social Darwinism, and stages of social system development as set

forth by Marx and by Durkheim. The structural-functionalism theory analyzes social patterns for their contribution to the society and their function. There are functional necessities of any social system, involving the environment, the biological requirements of humankind, and the requirements of group living. This approach, thus, might produce the requirements for a social system that would maximize the QOL, but such has not been envisioned, except ideally as utopian systems. There also are sociologists who see the social system as one continually in conflict and competition. Through these processes one group or another satisfies its needs and the system achieves some level of adjustment, until the process is repeated.

The preceding analysis illustrates some of the contributions that sociologists have made to understanding the forces that generate QOL. The concept, however, plays a minor part in these studies. What would bring about greater emphasis upon QOL in sociological research? We think there are two paths to further development.

First, if sociological theories feature the concept as a value objective, then the QOL will become the subject of research studies. Several of the aspects of QOL that the theory should encompass already are evident:

1. The socially defined standard of living,
2. The level of living as evidenced by the physical attributes of the family,
3. The toxic/clean physical environment and climate,
4. The satisfaction and benefits that derive from social participation in the social agencies and institutions of the locale,
5. General satisfaction,
6. Happiness,
7. The characteristics and structure of the social system that produces the QOL.

This is a big order. One should only expect incremental approximations to a comprehensive theory.

Second, if legislatures require that the initiatives of legislation be evaluated by QOL measures, then improvement of the QOL will become a goal. For this to happen, objective and subjective QOL measures must achieve some level of standardization. Currently,

legislation to reduce poverty, for example, employs not QOL, but the percent of the population below the Federally defined poverty line. Economists and other experts have warmly criticized the poverty definition, in use since the 1960s. QOL measures would serve the objectives of the legislation far better than the poverty measure. The Appalachian Regional Commission and the Delta Regional Authority, for example, could employ QOL criteria in their efforts toward economic development and poverty reduction. Health-related QOL indexes relative to specific conditions could be required as tests of benefits of medical interventions. To bring about such a development QOL researchers would need to demonstrate the reliability and validity of objective and subjective QOL measures.

#### *Concluding Remarks*

Beginning during the 1930s, sociologists have been instrumental in forwarding the idea of a social report and the development of composite level of living measures. When social indicators began to blossom in the 1960s, sociologists advanced developments both in analytical approaches and in the need for expanding data gathering efforts. Sociologists have advanced the ideas of measuring, monitoring, evaluating, and forecasting with statistical time series of components of the human condition. Measures of QOL began to be introduced into surveys in the 1970s and in the 1980s sociological research on QOL became stronger. While QOL concepts have found a minor place in sociological research, the concept has not gained coinage in general sociology. Its time will come when evidence accumulates of the function QOL plays in the human condition and when theory, which strives to remain value neutral, finds a place for valuation. When legislation requires the use of QOL measures, it shall have arrived.

#### HISTORY OF QOL STUDIES FROM AN ECONOMICS PERSPECTIVE (RICHARD A. EASTERLIN)

Concerns about QOL are of central importance throughout the history of economics, even though such concerns are sometimes implicit, rather than openly addressed. Of foremost significance as a measure

of welfare has been national income, which, in the first half of the 20th century, was transformed from an abstract theoretical concept to a solid empirical measure. In the last half of the 20th century, as national income measurement evolved into a system of national economic accounts with GDP at the center, alternative approaches to measuring well-being have been proposed and developed, many of them foreshadowing or linking up with today's QOL measures. These approaches go in several directions. There are attempts to restore GDP to the original goal of measuring economic welfare by adjusting it for various "goods" and "bads." There are also efforts to develop measures that relate directly to specific aspects of quality of life, such as food and housing. Finally, there are attempts to develop more comprehensive indicators of well-being by synthesizing indicators relating to material living conditions, length of life, education, and the like.

All of this work has involved what are usually referred to as "objective" measures, although, as shall be noted below, this work, including that on national income and GDP inevitably requires subjective judgments by the analyst on the meaning and content of well-being. Personal reports on feelings of well-being, such as individual happiness or life satisfaction, have customarily been dismissed by economists on the grounds that it's what people do that's important, not what they say (Fuchs, 1983, p. 14). As data on happiness and life satisfaction have accumulated, however, there has been a small but growing amount of economic research on reported happiness and life satisfaction, and these measures have started to be used in discussions and analyses of public policy choices (Donovan and Halpern, 2002; Gruber and Mullainathan, 2002).

In what follows, we touch briefly on economic research in each of these areas of QOL research, focusing chiefly on developments in the United States.<sup>2</sup>

#### *National Income and GDP*

These days GDP is commonly faulted as a measure of well-being, but it was not always that way. Since the French Physiocrats of the late 18th century, national income has played a central role in economic analysis. In the 1920s volume, *The Economics of Welfare*, by British economist A.C. Pigou, one of the founding fathers of

modern welfare economics, national income is taken as the primary measure of economic well-being. Pigou also distinguishes between economic welfare and a broader concept of “social” welfare, of which economic well-being is a component. But his view “that there is a clear presumption that changes in economic welfare indicate changes in social welfare in the same direction, if not the same degree” is still widely held by economists (Pigou, 1929, p. 3).

The foundation work in the measurement of national income was done by Simon Kuznets, the third Nobel laureate in economics. Kuznets built on the work of numerous predecessors, and was paralleled in his efforts by other scholars, most notably British statistician A. L. Bowley. But it was Kuznets who, starting in the late 1920s, established a comprehensive research program on national income under the sponsorship of the National Bureau of Economic Research (NBER), which was at the time the United States’ leading organization in empirical economic research. Kuznets played the leading role in the early development of United States official measures of national income, and was a founder of the NBER’s Conference on Research in Income and Wealth, and subsequently the International Association for Research in Income and Wealth. The long series of conference volumes produced by these two Associations explore in detail many of the issues of national income measurement.

Kuznets identified and examined at length the same questions that plague scholars today in developing a comprehensive measure of well-being. He argued vigorously that national income is an attempt to appraise an economy’s performance in the light of some generally accepted end purpose(s); in ordinary times, this purpose is to provide commodities and services that contribute to consumer’s well-being, both present and future. Empirical implementation of this concept raises three types of questions – scope, netness, and valuation – questions that continue to be debated today in all QOL assessments. With regard to scope the problem of non-market economic activity – goods produced and consumed in kind – was of major importance, particularly with regard to goods produced and consumed within the home. Less important quantitatively, but not conceptually, were the products of activities often deemed illegal, such as narcotics and the services of prostitutes. The issue of netness involves distinguishing between final and intermediate goods. Are governmental

expenditures to provide police and fire protection appropriately thought of as end products or are such outlays largely necessary costs to ensure the production by business firms of goods that do contribute directly to consumer welfare? What of military expenditures – does a growth in such expenditures translate into a corresponding increase in consumer welfare? Are consumer outlays on commutation and labor union fees a final product or a cost to consumers of securing the final goods that do contribute to their well-being? And once one has established in terms of scope and netness the goods that are appropriately included in national income, how should they be valued in order to aggregate them into a summary measure? Kuznets brought to consideration of these questions a concern with comparing welfare across widely diverse economies – from Great Britain to India, from the United States to the former Soviet Union. Much of what he said is as germane today as it was more than half a century ago (Kuznets, 1933, 1941, 1945, 1946).

The obvious element of subjectivity in national income measurement, which Kuznets repeatedly stressed, was hard for those in government and international agencies to swallow. Spurred by a desire to develop general-purpose measures and to clothe their work in the mantle of objectivity, they formulated a system of national economic accounts, on analogy with business accounts. Subjective judgments defining the scope, netness, and valuation of the economy's end products were described merely as "conventions." In the United States, publication of these national income accounts occasioned a heated exchange between Kuznets and officials in the Department of Commerce's National Income Division, some of whom were Kuznets' former students (Kuznets, 1948; Gilbert et al., 1948). In time the weight, if not the wisdom, of officialdom prevailed, and a common system of national economic accounts was adopted by the United States, United Kingdom, and other countries, as well as the Statistical Office of the United Nations, due particularly to the pioneering work of 1984 Nobel laureate Richard Stone (1985).

### *Adjusting GDP*

Despite the establishment of "official" concepts, the thorny issue of the use of such magnitudes as GDP or GNP as a measure of economic welfare surfaced repeatedly in the economics literature and was a

recurrent theme in the volumes of the two Associations on Research in Income and Wealth. Perhaps the best known attempt within the economics profession to adjust GNP to obtain a more meaningful measure of economic well-being is a study by William Nordhaus and James Tobin (1973), which is a direct forerunner of contemporary measures such as the Index of Sustainable Economic Welfare. Nordhaus and Tobin follow Kuznets' ideas of scope and netness by adjusting GNP to include the value of nonmarket economic activities; by eliminating "consumer costs," governmental military spending and similar outlays necessary for the economy's functioning; and by subtracting the costs of "disamenities" associated with urbanization and congestion. Of these, the biggest adjustment by far is the imputation for nonmarket activities, which is nearly equal in magnitude to the flow of consumer goods and services through the market. The total for consumption thus obtained is then virtually doubled by an imputation for the value of leisure, on the grounds that twice as much consumer output would have been available if people had forgone leisure for work. These adjustments to GNP are made to United States data for 1929–1965. In the end Nordhaus and Tobin arrive at a conclusion, which, like that of Pigou's noted above, is comforting to economists: "Although GNP and other national income aggregates are imperfect measures of welfare, the broad picture of secular progress which they convey remains after correction of their most obvious differences" (Nordhaus and Tobin, 1973, p. 532). In contrast, the recently proposed Index of Sustainable Economic Welfare grows hardly at all in the United Kingdom between 1950 and 1996 (Jackson et al., 1998). Among other differences from the Nordhaus–Tobin measure, this index includes sizeable adjustments for income inequality, costs of climate change, and the cost of ozone depletion, and does not include an imputation for leisure.

#### *Alternative Indicators*

Early on, as national income morphed into a system of "general purpose" national accounts, some economists interested in measuring welfare began developing alternative indicators. Typically this work proposed a set of measures, each relating to a specific dimension of well-being, and then combined the elements of the set into a single comprehensive measure. Some of this work focused primarily on

economic well-being, especially consumption; some went beyond to non-economic aspects of welfare. Two dominant concerns motivated this work: first, serious reservations about the validity of GDP or GNP as a measure of welfare, and, second, after World War II as economic research increasingly turned toward less developed countries for which statistical sources were scarce, the need for quality-of-life indicators that drew on whatever limited data were available.

Among the leaders of those motivated by the desire to get meaningful empirical measures for less developed areas were scholars at Stanford University's Food Research Institute. M.K. Bennett sought to compare international differences in consumption levels in 1934–1938 by developing 16 non-monetary indicators ranging across five categories of consumption: food and tobacco; medical and sanitary services; housing; education and recreation; and transportation and communications (Bennett 1951; cf. also, 1937). W.O. Jones and Christian Merat tried to study material living levels in sub-Saharan Africa by drawing on the data most widely available, statistics of international trade (Jones and Merat, 1962). This work foreshadowed in a modest way current efforts to develop alternative indexes of economic welfare that build out from measures of personal consumption, such as the Osberg–Sharpe Index of Economic Well-Being, which incorporate, in addition to consumption, allowances for wealth accumulation, inequality, and, an especially novel element, economic insecurity, that is, the risk of unemployment, illness, single parent poverty, and old age (Osberg, 2001; Osberg and Sharpe, 1998).

Among early reactions against primarily economic measures of well-being were the reports of the United Nations Department of Social Affairs, which assembled data on the world's social situation and pointed out that international disparities in conditions such as length of life did not simply parallel those in economic condition (United Nations, 1952, 1961). A valuable study in this vein was published in 1970 by four economists at the United Nations Research Institute for Social Development (McGranahan et al., 1970). This body of work has its counterpart today in such measures as Richard Estes' Weighted Index of Social Progress (Estes, 1995).

In 1979 economic historian Morris David Morris proposed a physical QOL index (Morris, 1979), combining measures of economic output, life expectancy, and education. This measure is a direct forerunner of today's Human Development Index published annually in

the United Nations Human Development Report (2002, pp. 149–152). Currently, economic historians, following the lead of Fogel (1986, 1993), are focusing on measures of stature, taken to be indicative of an undefined “biological” standard of living (Komlos, 1995; Steckel and Floud, 1997).

### *Self-Reported Well-being*

The first attempt in economics to assess the trend of well-being in terms of personal reports on happiness or life satisfaction is that of Easterlin (1974), which found that over the period 1946–1970, average happiness in the United States rose through the late 1950s, and then fell, returning to near its 1946 level. Economic research on subjective testimony languished over the next two decades with only a few exceptions (Frank, 1985; Scitovsky 1976), although Bernard M.S. van Praag made notable advances in the analysis of subjective data on the adequacy of income (see the overview in van Praag and Frijters, 1999).

Since around 1990 there has been a small upsurge in economic research on subjective well-being. Considerable credit for this is due to the work of British economist Andrew Oswald and his collaborators, as well as to Bruno Frey, a long-time scholar in economic psychology (Frey and Stutzer, 2002; Oswald, 1997). A major difference from the so-called “objective measures” described in previous sections is that these subjective measures do not require value judgments by the analyst on the questions of scope, netness, and valuation, because the aggregation of the various dimensions of well-being is performed by the respondent in arriving at his or her stated well-being. Use of these measures does, of course, entail a judgment by the analyst that individual happiness or life satisfaction is the social goal in which one is interested (for reservations, cf. Sen, 1999).

## HISTORY OF QOL STUDIES FROM A PSYCHOLOGICAL PERSPECTIVE (WILLIAM PAVOT)

### *Introduction/Overview*

Measures of Subjective Well-Being (SWB), or happiness, can be taken to represent subjective measures or indicators of the quality of

life (QOL). SWB measures can provide an important compliment to objective QOL indicators, such as economic trends and other social indicators. Happiness has long been a concern and goal for individuals and societies alike, yet the empirical study of happiness, or SWB, has a relatively short history within psychology. In this chapter, the emergence of research on the QOL from a psychological perspective is reviewed. After an historical overview and brief discussions of the definition and measurement of SWB, subsequent sections will focus on various theoretical approaches, empirical findings, and current issues of concern for SWB researchers. A final section will examine potential future directions for the field, and will discuss the importance of including both subjective and objective indicators within larger QOL indices when assessing well-being at the national or societal level.

#### *Philosophical Underpinnings/Origins of SWB*

Contemporary researchers have traced the philosophical origins of well-being concepts back to ancient Greece (Diener, 1984; Ryan and Deci, 2001). The “hedonic view” (Ryan and Deci, p. 143) has been seen as following from the philosophy of Aristippus. Aristippus advocated the maximization of pleasure as the goal of life and the source of happiness. The Epicureans later followed this theme, albeit in a somewhat more moderate fashion. This is the view most closely associated with the modern conceptualization of SWB.

Another view, the “eudaimonic view” (Ryan and Deci, 2001, p. 145), stems from the Aristotelian perspective. For Aristotle, the degree of virtue in one’s life is the critical standard of evaluation. Living a life of virtue, rather than a life of pleasure, was the key to reaching the desirable state of “eudaimonia.” Theories reflecting the eudaimonic viewpoint tend to focus on self-realization, and activities related to personal growth and development, and tend to downplay pleasure-seeking as the central source of well-being. Adherents to this view have begun to use the term “psychological well-being” (Ryff and Keyes, 1995).

Although researchers subscribing to one or the other of these two views often disagree on the definition and the primary source(s) of well-being, these approaches tend to be complimentary and ultimately have enriched the view of the nature of well-being (Ryan and

Deci, 2001). For the purposes of this chapter, however, the primary focus will be on SWB, as the preponderance of empirical research has been based upon measures intended to assess SWB rather than psychological well-being.

### *Emergence of SWB within Psychology*

Many who review the field of psychology date its beginnings from approximately 1879. Wilhelm Wundt is often credited with the establishment of the first psychology laboratory in that year (Bernstein et al., 2003).

For most of its first century, psychology devoted little time or energy to the understanding of happiness or SWB. The dominant early approaches to psychology (e.g., Psychoanalysis, Behaviorism) did not emphasize subjective experience, focusing instead on unconscious dynamics or environmental contingencies in the search for explanations of behavior. When subjective experience was considered, it was usually associated with distress or disorder, often in the form of depression or anxiety. Psychology was oriented towards the goal of alleviating suffering and emotional anguish, rather than the understanding of well-being. It was not until the middle of the 20<sup>th</sup> century, and the emergence of humanism as an alternative approach to the understanding of human behavior, that subjective experience would begin to be considered as a significant indicator of the underlying state of the person.

In the 1960's, a few researchers began to focus on happiness as a central topic. Warner Wilson (1967), for example, published a review paper focused on "Correlates of Avowed Happiness," in which he described the characteristics of a happy person. Although some of Wilson's conclusions have not been supported by subsequent research, his review did provide a starting point for those interested in the empirical study of SWB.

In 1969, Bradburn introduced the "Affect Balance Scale," an instrument intended to assess both negative affect (or emotion) and positive affect (or emotion). Bradburn's findings were important, in that they demonstrated the relative independence of positive affect (PA) and negative affect (NA), and supported the idea that positive and negative affect represented separate factors within the encompassing construct of SWB. At the conceptual level, Bradburn's work

suggested that comprehensive models of SWB must consider the presence of PA, as well the relative absence of NA, in order to more completely represent the construct of SWB. With the Affect Balance Scale, it was possible to subtract the sum of responses to negative affect items from the sum of responses to positive affect items, and thereby determine the affective or emotional “balance” of the respondent. Although several potential psychometric problems with the Affect Balance Scale have been identified (Diener and Emmons, 1984), it has been and continues to be widely used by researchers interested in SWB.

During the decade of the 1970's, research on SWB within psychology slowly gained momentum. As evidence of this trend, Diener (1984) notes that *Psychological Abstracts International* began to list happiness as an index term in 1973. Another development of note occurred in the following year, with the publication of a new journal, *Social Indicators Research*. This new journal, focused on QOL research, represented an important publication outlet for SWB researchers, and a critical asset to the growth of the field.

Large scale national QOL surveys, which included assessments of SWB, were conducted in the 1970's (Andrews and Withey, 1976; Campbell et al., 1976). The SWB assessments included within these surveys tended to focus on an aspect of SWB that is somewhat distinct from the affective components discussed earlier. These survey assessments asked respondents to formulate judgments about their level of satisfaction, either with life as a whole (Andrews and Withey, 1976), or with some specific aspect or domain of their life (Campbell et al., 1976). Such satisfaction judgments are viewed as involving cognitive processes, and thus they represent an aspect of SWB that is at least partially distinct from PA and NA. Satisfaction judgments can be approached from a very broad perspective (e.g., satisfaction with life as a whole), or from a more specific domain level (e.g., satisfaction with one's job or housing). Overall, these surveys reinforced the importance of the inclusion of a cognitive component within comprehensive models of SWB.

At the beginning of the next decade, Costa and McCrae (1980) published the findings from three studies providing evidence for the link between personality and SWB. This series of studies was noteworthy in several respects. First, Costa and McCrae explained the relative independence of the PA and NA components of SWB by

demonstrating that each was associated with a different set of personality traits. PA was shown to be associated with facets of the broad temperament-level trait of extraversion, whereas NA was related to sub-components of the broad temperament characteristic of neuroticism. Secondly, their longitudinal design revealed the temporal stability of both personality and SWB, in this case demonstrated over a period of ten years. Finally, they presented an individual differences model of SWB that could account for an impressive amount of the variance in the level of SWB between people (Costa and McCrae, 1980).

A comprehensive review by Diener (1984) served as a focal point for investigators working within the growing area of SWB research. Diener (1984) reviewed issues involving the definition and measurement of SWB, data indicating the factors correlated to SWB, variables likely to influence SWB, and a number of theoretical perspectives. This informative review served to both stimulate and strengthen the methodology of research devoted to SWB, and provided interested investigators with new directions for their work.

The final decade of the second millennium witnessed an explosive expansion in research on SWB. Hundreds of studies focused on one or more aspects of SWB were conducted and published annually (Myers and Diener, 1995). In 1999, a comprehensive volume presented an overview of “hedonic psychology” (Kahneman et al., 1999). In 2000, a special issue of *American Psychologist*, devoted exclusively to “positive psychology” (Seligman and Csikszentmihalyi, 2000, p. 5), was published.

Thus, over a few short decades, great interest in issues related to the QOL, including optimism, optimal functioning, self-determination, intrinsic motivation, and SWB has emerged within the field of psychology. The remaining sections of this chapter will focus on more specific aspects of the evolution of SWB research within psychology, and will also attempt to briefly outline current issues and some potential future directions for the field.

#### *Definition of SWB*

The definition of SWB which has emerged over time is that of a broad, multi-faceted domain, which includes the affective and cognitive components that were gradually identified by the early research

discussed in the previous section. Diener et al. (1999) have offered the following: "Subjective well-being is a broad category of phenomena that includes people's emotional responses, domain satisfactions, and global judgments of life satisfaction" (p. 277). Such a definition casts SWB as representing a broad area of research activity and interest, rather than as a specific construct.

The affective components of SWB, PA and NA, are typically viewed as ongoing or "on-line" (Diener, 2000, p. 34) subjective evaluations by an individual of his or her current experience. At any given moment, PA and NA may be highly (inversely) correlated, but as the mood of an individual is evaluated across an expanded time-frame, PA and NA often show increasing divergence. Since relatively long-term moods, rather than isolated immediate experiences, are typically of greater interest to SWB researchers, it is usually desirable to assess PA and NA separately, in order to capture the dynamics and unique variance of both completely.

In addition to the affective components of SWB, the process of the subjective cognitive evaluation or judgment of one's life, often referred to as life satisfaction, represents a third identifiable facet of overall SWB. Life satisfaction has been shown to form a separate factor from PA and NA (Andrews and Withey, 1976), and subsequent multi-method longitudinal research (Lucas et al., 1996) has demonstrated that all three SWB components, PA, NA, and Life Satisfaction, are separable constructs.

It is possible to approach satisfaction judgments from different levels of analysis. The labels "life satisfaction" or "satisfaction with life" are usually associated with a very broad conceptual level, involving summary judgments of one's life as a whole (Pavot and Diener, 1993b). Alternately, satisfaction with specific aspects of one's life (e.g., job satisfaction, satisfaction with housing, satisfaction with one's spiritual life) can also be assessed. This more specific approach is often identified as "domain satisfaction." Assessments at both the broad life satisfaction level and the domain satisfaction level can be informative, and their specific usefulness depends on the particular goals of the researcher utilizing them. Generally, investigators focused on specific aspects of life might choose to assess specific domain satisfaction(s), whereas researchers more interested in SWB at the theoretical/conceptual level might prefer a broader life satisfaction approach.

This contemporary definition characterizes SWB as a complex, multi-faceted experience, and stands in contrast to common earlier views of SWB as a “monolithic entity” (Diener et al., 1999, p. 276). The implication of this definition for researchers is that SWB must be approached with instruments and methodologies that match its complexity, in order to maximize the validity of their findings.

In addition to defining the components of SWB, it is also important to review some assumptions about the nature of the construct. Diener (1984) has identified several hallmark characteristics of SWB. First, it is subjective, residing within the individual (Campbell, 1976), and it is based on his or her unique experience of the world. Objective conditions and events, although they are likely sources of influence on SWB, are not themselves integral to the construct.

A second characteristic is that SWB includes positive experience, rather than just the absence of negative factors (Diener, 1984). For example, SWB is more than just the absence of depression or anxiety. An individual may not be experiencing SWB, even if they are not suffering from a psychological disorder.

A third characteristic is that SWB is usually considered from a broad level, as an overall assessment, rather than according to specific experiences or aspects of the individual’s life. Specific experiences or life domains may be considered and assessed individually, but the emphasis is usually placed on the “integrated judgment of the person’s life” (Diener, 1984, p. 544).

#### *Advances in the Measurement of SWB*

The measurement of SWB has seen considerable development and refinement in the last four decades. Contemporary measures of SWB have increased in number, and generally display greater theoretical sophistication than the instruments that were available to earlier researchers.

Early measures of SWB tended to be brief, in some cases consisting of a single item embedded within a larger, multi-purpose survey questionnaire. The response to this single item was often taken as a wholistic representation of SWB, presumably encompassing all the sub-facets of the construct (PA, NA, life satisfaction). This generic, wholistic approach when using a single item measure is problematic, in view of the evidence that the facets of SWB are separable,

and often account for unique variance in the measurement of the overall construct. In order to reliably assess SWB in a comprehensive manner, researchers should use several measurement instruments, each of which being dedicated to the assessment of a single facet of the construct. An alternative would be to employ a multiple-item measure with a multi-factor structure, such as the Oxford Happiness Inventory (Argyle et al., 1995) which was designed to measure both satisfaction with life and emotional experiences. The use of single-item measures evokes other psychometric concerns as well. Although single-item measures have been shown to have some validity (see Andrews, 1984, for an excellent discussion of this issue), they tend to have low test-retest reliability, and their internal consistency is unknown (Schwarz and Strack, 1999). Further, they are more vulnerable to contextual influences, such as momentary mood or trivial contextual events (Pavot and Diener, 1993a; Schwarz and Strack, 1999) than multiple-item measures.

In view of the above concerns, most contemporary SWB measures are multiple-item instruments, and they generally have sub-scales to measure the separate facets of SWB, or they are dedicated to the measurement of a single facet of the broader SWB construct. The Satisfaction With Life Scale (SWLS; Diener et al., 1985; Pavot and Diener, 1993b) is an example of a multiple-item measure intended to assess life satisfaction. The SWLS has been demonstrated to have high internal consistency, as well as good test-retest reliability (Pavot and Diener, 1993b). Other instruments, such as the Positive and Negative Affect Schedule (PANAS; Watson et al., 1988) are available for the assessment of PA and NA. These instruments are in many respects representative of the reliability and the specificity of contemporary measures of SWB.

Along with advances in the instruments designed to assess SWB have come improved approaches to the methodology by which such measures have been employed. Many early studies involved the exclusive use of self-report measures, and typically these measures were completed only once by the respondent, in a cross-sectional research design. Although the data produced by these basic research designs has been useful, a number of methodological problems that cast some doubt on their validity have been identified. For example, it has been demonstrated that relatively trivial events, such as a sunny versus cloudy day (Schwarz and Clore, 1983), can influence

how a person may respond to measures of SWB. It has become common practice, therefore, to use longitudinal designs, measuring SWB on multiple occasions, in order to minimize the effects of such transient contextual conditions. Multiple method designs have also become more common. In multi-method designs, traditional self-report measures of SWB are compared with reports from informants (often obtained from spouses or other raters who are familiar with the target person) or other nonself-reported indicators of SWB such as physiological measures, rating by interviewers, computer-based reaction-time measures, and ratings of facial expressions.

Another promising methodological technique is Experience-Sampling Methodology (ESM; Diener, 2000). ESM involves the random sampling of a respondent's moods and thoughts over time, by using a palm computer as both a signaling device and also to collect and store the individual's responses. ESM data can overcome many of the potential problems of traditional self-report measures, such as the mood of the respondent at the moment of the assessment. Because ESM data can be averaged across many occasions, momentary mood fluctuations or transient situational factors can be effectively cancelled out. Diener et al. (1993) compared one-time, self-reported measures of life satisfaction with informant reports and ESM data within a single study, and found moderate to strong correlations among these methodologies. ESM represents a powerful new approach to the assessment of SWB, but it may not always be an ideal approach (Scollon et al., 2003), especially when researchers are concerned with the cognitive aspects of SWB.

In sum, there has been considerable evolution in the measurement of SWB. The reliability and validity of measures has been appreciably increased, and a number of methodological alternatives are available to enhance the traditional self-report approach.

#### *Theoretical Approaches*

Over time, SWB has been approached from several theoretical perspectives. At a very general level, most theories can be categorized as "top-down" or "bottom-up" in nature (Diener, 1984, p. 565). Essentially, bottom-up theories follow from the assumption that, as humans, we all have basic needs, and, if our life circumstances allow for fulfillment of these needs, happiness will be achieved (Diener

et al., 1999). Top-down theories, on the other hand, typically are focused on the mechanisms by which factors within the person (e.g., personality traits) determine how an individual perceives and interprets his or her life circumstances and the events they experience in positive or negative terms.

Some evidence for the importance of bottom-up processes has been presented (e.g., Stallings et al., 1997). On the whole, however, the power of demographic variables and life circumstances to explain overall SWB has generally been modest (Campbell et al., 1976). Top-down explanations for SWB have enjoyed somewhat greater success. For example, the broad personality traits of extraversion and neuroticism, often identified as representing an individual's temperament, have been consistent predictors of SWB (DeNeve and Cooper, 1998).

One explanation for the relatively limited association with life circumstances and SWB has been the process of adaptation (Brickman and Campbell, 1971). Essentially, the process of adaptation involves the gradual habituation or adjustment of individuals to life changes, both good and bad. Initially, when we experience a powerfully good or bad event in our lives, we typically have a strong affective reaction. Over time, however, we gradually return to a level of SWB that was typical for us before the event occurred. This chronic level of SWB is usually thought to be determined by our temperament or personality characteristics (e.g., Heady and Wearing, 1992). Therefore, from a long-term perspective, personality characteristics are more strongly associated with levels of SWB than are most life events.

Despite the powerful and pervasive tendency toward adaptation, several "exceptions" to the rule of adaptation have been identified. For example, widowhood (Stroebe et al., 1996), status as an Alzheimer's caregiver (Vitaliano et al., 1991), and the experience of unemployment, even if eventual re-employment occurs (Lucas et al., 2004) all represent life experiences that appear to have a lasting detrimental effect on SWB.

Along with the general top-down and bottom-up perspectives, several somewhat more focused theoretical approaches have been considered. One such theory is the "Multiple Discrepancies Theory" of satisfaction (MDT; Michalos, 1985). According to MDT, individuals compare themselves to multiple standards as they make

judgments regarding their level of satisfaction. These standards might include past conditions, other people, or aspirations, for example. The individual assesses the discrepancies between their current state or current conditions and these standards. If the comparison standard is higher than the individual's current state (an upward comparison), the comparison will result in decreased satisfaction, whereas if the current state of the individual compares favorably with the standard (a downward comparison) the comparison will result in increased satisfaction. Thus, according to MDT, overall life satisfaction judgments involve multiple comparisons that might involve examining the discrepancies across a number of domains. In some cases, the standards might evolve from self comparisons, for example, comparing one's present performance of some skill with past performance. Often however, standards are created through the process of social comparison, comparing ourselves and our conditions to those around us.

Social comparison has emerged as a rather complex process, which can be influenced by a number of factors or conditions (for a more complete discussion, see Diener et al., 1999). It does appear that, at least over the short term, social comparison can indeed affect SWB (Diener and Fujita, 1997). A more lasting effect of social information on SWB, however, might be that such information appears to influence the process of formulating and modifying goals (Diener et al., 1999).

Theories focused on the examination of goals, sometimes referred to as "telic" theories (Diener, 1984, p. 562), generally view SWB as contingent on attaining a desired endpoint (or goal), or the fulfillment of a need. Some classic models of need fulfillment focus on universal needs (e.g., Maslow, 1954) whereas others view the strengths of various needs as differing from individual to individual (e.g., Murray, 1938). Generally, goals represent the more specific and conscious desired endpoints toward which an individual is striving. The general theoretical notion is that progress towards goals or goal achievement generates PA, whereas a lack of progress toward or failure to achieve a goal generates NA (Diener et al., 1999). At a more specific level, however, the relation between goals and SWB becomes more complex. If people adopt goals that are incongruent with their needs, for example, then those goals may not be associated with enhanced SWB

(Kasser and Ryan, 1993). Also, ambivalence towards goals and conflict between goals (Emmons, 1986) are associated with NA.

Another concept related to SWB is the process of coping (Lazarus and Folkman, 1984). Coping involves the process of actively attempting to adjust to changes in the environment that are stressful to the individual. Coping is somewhat distinct from adaptation in that adaptation is a passive process, whereas coping involves the strategic selection and activation of a response by the individual. People differ greatly in their ability to cope with stressful life events successfully, and some coping strategies are much more effective than others when faced with a particular life-changing event (Folkman, 1997). Effective coping is positively associated with SWB (McCrae and Costa, 1986).

This brief review of theoretical perspectives is by no means intended to be all-inclusive. It is offered only as a representative sampling of the conceptual context from which SWB has been approached. Far more complete discussions are available elsewhere (e.g., Kahneman et al., 1999; Linley and Joseph, 2004).

#### *Findings from the Study of SWB*

A large number of findings have emerged from studies focused on one or more aspects of SWB. The vast majority of research on SWB has been correlational in nature; few studies have attempted to discern underlying causal mechanisms. Three areas of research concentration have involved personality characteristics, situational and demographic factors, and cultural factors.

In his early review of the research on happiness, Wilson (1967) identified several personality characteristics that related to the experience of SWB, including extraversion, optimism, and being “worry-free” (in current terms, emotional stability or low neuroticism). All of these personality characteristics have since been repeatedly related to the experience of SWB. At a very broad level of analysis, the basic temperament level, extraversion and neuroticism have consistently been shown to correlate with PA and NA, respectively (DeNeve and Cooper, 1998). In addition, agreeableness and conscientiousness have also been found to be positively related to SWB; thus, four of the “Big Five” personality dimensions are correlates of SWB (DeNeve and Cooper, 1998). Other, narrower traits, such as self-esteem and

dispositional optimism (Lucas et al., 1996) have also been found to relate to SWB.

Although personality traits are consistent and powerful predictors of SWB, they do not represent a complete explanation of happiness. Their predictive power can sometimes be moderated by other factors, such as powerful, stressful life events (Vitaliano et al., 1991; Lucas et al., 2004).

Situational or demographic factors have also been frequently examined as potential correlates of SWB. One frequently espoused belief is that more money will bring more happiness, and a number of studies have examined this assumption. While in some respects the correlation between wealth and SWB has been verified (Diener et al., 1999), the relation is complex, and in many instances is quite modest. It is also important to distinguish between within-nation studies and between-nation comparisons, as there are divergent patterns for each type of analysis. In studies comparing people at different income levels within a given nation, a positive correlation between income and SWB is usually observed (e.g., Diener et al., 1993). This relationship is strongest at relatively low levels of income, and generally becomes weaker in higher income brackets. At higher levels of wealth, in situations where people begin to value money more highly than other goals (Richins and Dawson, 1992), or materialism becomes a dominant value (Sirgy, 1998), wealth may become detrimental to SWB. When comparisons are made between nations, however, the relation between the wealth of a nation and the average SWB of its citizens is positive and strong (Diener et al., 1993).

Age and gender are two prominent demographic characteristics, and both have been examined with regard to potential relations with SWB. Wilson (1967) suggested that youth was a factor in SWB, but more recent studies have not strongly supported his conclusions. In a large scale international study, Diener and Suh (1998) found that among three components of SWB (PA, NA, and life satisfaction) only PA declined with age, and there was a slight increase in life satisfaction when young adults (in their 20's) were compared to older adults (in their 80's). Studies focused on gender and SWB have not found consistent differences between men and women. There is some evidence that women are more willing to report, and presumably are experiencing more intense emotions than men, but these experiences

appear to move in both positive and negative directions, so that the average level of SWB for women remains similar to that of men (Fujita et al., 1991).

A wide array of additional situational and demographic variables have been examined to determine their correlation with SWB. Religion and health, for example, have generally positive, but complex, relations with SWB (Diener et al., 1999). When compared to within-person factors such as personality traits, most of these life circumstances appear to have modest effects on SWB. Cultural factors also exert an influence on SWB (Diener et al., 2003), but research on the complexities of these factors has only recently begun to be undertaken.

One additional factor that appears to be essential to SWB is the existence and maintenance of positive social relationships (Diener and Seligman, 2004). In a study of the characteristics of very happy people (Diener and Seligman, 2002), all individuals in the highest SWB group reported excellent social relationships. These authors concluded that good social relationship might represent a "...necessary but not sufficient condition for happiness" (Diener and Seligman, 2002, p. 83). Good social relationships are a critical element for the experience of high levels of SWB.

An important, overriding issue in the study of SWB concerns the outcomes of happy people. Are people with high SWB really any better off in life than those who report lower levels of happiness? If the answer to that question is no, then research on SWB would have little value for society. A number of studies have been devoted to the outcomes of SWB, and some important benefits have been identified.

People with high SWB have stronger romantic and social relationships (Diener and Seligman, 2002). Based on longitudinal data, high SWB individuals are more likely to marry (Marks and Fleming, 1999), and to report satisfying relationships once married (Glenn and Weaver, 1981).

In their working life, high SWB individuals report higher levels of job satisfaction (Tait et al., 1989), receive better pay and higher supervisor ratings (Staw et al., 1994), demonstrate better on-the-job performance (Cote, 1999), and are good organizational citizens (George and Brief, 1992).

People with high SWB tend to maintain better mental health (Diener and Seligman, 2002) and physical health (Maddi and Kobasa, 1984) and show greater resistance to the effects of stress than those who are less happy (Fredrickson and Joiner, 2002).

Thus, a number of studies indicate that SWB is associated with benefits in key areas of life, such as interpersonal relations, work life, and health. The preponderance of evidence suggests that high SWB is of great value, at both the individual and societal level.

#### *Future Directions*

A number of issues remain to be addressed if research on SWB is to continue to develop, and to contribute to the overall quality of life of people. One issue is the need to improve the quality of research. Despite the refinement of the concept of SWB and the advancements in assessment discussed above, a large number of SWB studies continue to be conducted in rudimentary and “unsystematic” fashion (Diener and Seligman, 2004). Many studies focus on only one facet of SWB, such as PA or life satisfaction, and do not include assessments of the other SWB components, with the consequence that individual studies are difficult to compare with each other. Another common shortcoming is a tendency to conduct cross-sectional rather than longitudinal research, even though the weaknesses of the former and the advantages of the latter are well known. A more systematic approach to the assessment of SWB, such as the one outlined by Diener and Seligman (2004), would allow for more meaningful study-to-study comparisons, and could eventually result in a much more valuable and interpretable global database.

Another issue is the inadequacy of most of the SWB data in terms of explaining underlying causal mechanisms. The vast majority of SWB studies are cross-sectional and correlational in nature, and hence they lack the power to support causal explanations. Systematic longitudinal designs, such as Marks and Fleming (1999) for example, could begin to reveal developmental trends in SWB, and could allow for the examination of the effects of life experiences (e.g., marriage, changes in employment) on an individual’s overall level of SWB. In the same vein, the interactions between the various correlates of SWB (e.g., personality, life events) remain largely unexplored. Such interactions could be more fully articulated with a longitudinal approach.

A third issue involves the application of findings from research on SWB. Many practical applications of the findings on SWB have been identified (Linley and Joseph, 2004), but to date the implementation of these interventions has been minimal. Public policy, for example, is often influenced by objective (social) indicators, but subjective indicators have had little if any influence on these decisions. A systematic and comprehensive national index of SWB indicators (Diener, 2000) could have the effect of raising SWB measures to a complimentary position relative to other QOL indicators.

#### *A National Index of SWB*

For many years, a host of economic and other social indicators have been available to organizational and governmental policy-makers to assist and inform their decision-making process. Data regarding personal income, employment rates, crime rates, literacy rates, infant mortality rates and a wide array of other social indicators are readily available to inform policy decisions in both the private and public sectors. While these objective indicators represent extremely valuable information, there is increasing evidence (Diener and Seligman, 2004) that they provide an incomplete assessment of the well-being of the individual members of given group or society. Economic indicators, for example, are often taken as powerful QOL indicators. But economic indicators tend to become increasingly inaccurate predictors of SWB as societies become more affluent (Diener and Diener, 1995). In particular, when affluence and material wealth become primary goals, SWB may indeed suffer (Kasser and Kanner, 2004). Other social indicators, such as incidence rates for mental disorders (Diener and Seligman, 2004) have similar shortcomings. A national index of SWB could serve an important role as a cross-check on the validity of economic and other social indicators.

#### *Summary*

The history of QOL studies from a psychological perspective is brief, spanning only a few decades. The study of positive psychology and SWB, however, has gained great momentum with the realization that the absence of distress does not equate with happiness, and that SWB is a complex phenomenon, worthy of sophisticated scrutiny. Over

time, the definition of SWB has been clarified, reliable and valid measures of SWB have been developed, and increasingly sophisticated research methodologies have emerged. Several significant tasks remain to be completed, however. These include the development of a more systematic approach to assessment, the translation of the findings of SWB research into practical applications, and the development of an index of subjective QOL indicators to compliment the existing social indicators already in use by social policymakers.

#### SHORT HISTORY OF HEALTH-RELATED QUALITY OF LIFE RESEARCH (DONALD PATRICK)

QOL from a health perspective, sometimes referred to as health-related QOL, has a long tradition attributable in part to the addition of the word “health”. Debate over health and its boundaries in relation to happiness and QOL goes back centuries. Aristotle (circa 335–323 B.C., 1976) recognized the importance of health in his definition of happiness in the *Nicomachean Ethics*: “When it comes to saying in what happiness consists, opinions differ, and the account given by the generality of mankind is not at all like that of the wise. The former take it to be something obvious and familiar, like pleasure or money or eminence, and there are various other views, and often the same person actually changes his opinion. When he falls ill, he says that it is his health, and when he is hard up he says that it is money.” Persons enduring disease or disability often see QOL as centering on the malady and its effects as the illness condition dominates life itself. Material possessions matter less (Sontag, 1978).

QOL and health care have been linked for centuries through treatment, particularly the rise and domination of technology in medical care. Treatment by lay persons and healers for illnesses and by health professionals for diagnosed medical conditions often involves some sort of technology that itself impacts on life and QOL. In some cases, the treatment is so profound that it dictates QOL, such as living with a respirator. Technological advances are endless and many of the early proponents of “health-related QOL” were medical practitioners. Karnofsky first proposed a non-physiologic outcome parameter for cancer in 1947 (Karnofsky et al., 1948). The Karnofsky Performance Scale remains in use in cancer therapy trials to this day.

Even older, the New York Heart Association (1928) functional cardiac classification has a similar history.

Over the past century, advances in medical sciences have dramatically enhanced the capability of prolonging life. While survival holds a high value, perhaps the highest of all for most people, QOL has become more and more a consideration. As health declines precipitously, people often question if the QOL is worth the physical and emotional distress associated with medical conditions and/or their treatment. Trading off quantity and QOL is increasingly an issue for the persons and loved ones faced with decisions about technology and its potential. The work of Barbara McNeil and these questions of trading off treatment alternatives have put QOL squarely into medical decision-making and QOL is a major topic at meetings of the Society for Medical Decision-Making (McNeil et al., 1975).

A link between "QOL" and health policy probably occurred in the United States during World War I and World War II. Recruits to the armed services were found to have health problems that made them ineligible to serve, and congressional concern was expressed over the possible poor "health of our youth". In addition, a number of social scientists were involved in the World War II effort, drawing attention to social and psychological forces driving health and well-being (Ogburn, 1944; Stouffer, 1949).

The concern about well-being did not stop with the American soldier. If young men were not fit to serve in the armed forces, what was the nation's health? This question prompted attention to national health goals and the health status of the nation as a whole. This concern led later to the establishment of the National Center for Health Statistics (NCHS). Developing indicators for monitoring the health of the US population developed into a rich tradition of research and application through the health surveys conducted by NCHS and the development of an entire field of population health status assessment by social and health scientists involved in designing and applying sociomedical indicators (Elinson, 1974; Elinson and Siegmann, 1979).

The broadening of health to include QOL is also reflected in public health history. The constitution of the World Health Organization (WHO, 1948) stated that health is "physical, mental, and social well-being and not merely the absence of disease or infirmity." This definition suggests that illness compromises not only the physiological or

biological aspects of existence, but also the psychological, social, and economic well-being. To this day, the demand for a more “holistic” view of medical problems invokes QOL. More lately, the World Health Organization Quality of Life (WHOQOL) group, a worldwide research group convened by the World Health Organization defined quality of life as “individuals’ perceptions of their position in life in the context of the culture and value systems in which they live, and in relation to their goals, expectations, standards, and concerns” (The WHOQOL Group, 1996). Concerned with health in its core module, the “quality of life” concept has been broadened to include environmental aspects.

### *Terminology*

Health status, functional status, well-being, QOL, and health-related QOL are concepts that are often used interchangeably in the health field. There is considerable agreement that the QOL construct is more comprehensive than health status and includes aspects of the environment that may or may not be affected by health or perceived health. The health status concept and its domains and constructs range from negatively valued aspects of life, including death, to the more positively valued aspects such as role function and happiness. Health status is a useful concept in the context of assessing health services and treatment effectiveness. Functional status measures usually refer to limitations in the performance of social roles or activity limitations. The status concept is highly dependent on the perspective of the assessor and the assessed. Well-being measures refer to subjective perceptions, including reports of unpleasant or pleasant sensations and global evaluations of health or subjective status. Symptoms may be included in well-being measures or considered separately.

Well-being and quality of life may be distinguished by the level of evaluation. Quality of life contains more global evaluations of life position and perspectives, and well-being contains more domain-specific perspectives such as psychological or physical (Kahnemann et al., 1998). Sometimes health-related quality of life is equated with functional status, and this labeling can be erroneous and of particular concern to persons with disabilities. Persons with functional limitations may enjoy high quality of life through

## Exhibit 3

## Matching Marketing Philosophies with the Various Elements of the Marketing Mix

Marketing Philosophy	Strategic Focus	Examples of Mktg. Strategies
Production orientation Product orientation	Price Product	<ul style="list-style-type: none"> <li>• Low cost strategy</li> <li>• Product quality</li> <li>• Product differentiation</li> <li>• Brand positioning</li> </ul>
Channel orientation	Place	<ul style="list-style-type: none"> <li>• Direct marketing</li> <li>• Vertical integration</li> <li>• Selective distribution</li> </ul>
Selling orientation	Promotion	<ul style="list-style-type: none"> <li>• Mass media advertising</li> <li>• Sales promotion</li> <li>• Trade promotion</li> <li>• Personal selling and sales mgt.</li> </ul>
Marketing orientation	Prospects	<ul style="list-style-type: none"> <li>• Focus strategy</li> <li>• Relationship marketing</li> <li>• Customer satisfaction</li> <li>• Customer value perception</li> </ul>
Societal marketing orientation	Publics	<ul style="list-style-type: none"> <li>• Green marketing</li> <li>• QOL-marketing</li> </ul>

Source: Adapted and modified from Sirgy and Lee (1995, p. 24).

environmental supports or simply through their own life perspective and evaluation of their needs and desires. Although function may be important to many evaluations of their health, health-related quality of life or quality of life should not be used as synonyms.

Wellness is yet another term that has quality-of-life connotations. Dr. Halbert Dunn, the first director of the National Office for Health Statistics, introduced the idea of high-level wellness (Dunn, 1959). He defined it as “an integrated method of functioning which is oriented toward maximizing the potential of which the individual is capable, within the environment where she/he is functioning.” He elaborated on a philosophy that was, from the start, multidimensional, centered on personal responsibility and environmental awareness. This approach is highly related to that of the “needs-based” model described below.

The term health-related quality of life is often used to indicate that the measure is concentrated on the health concept and the field of health outcomes. Building on the original WHO definition, investigators and their measures of HrQoL almost always concentrate on physical, psychological and social aspects, most notably functional status, activities of daily living, or role limitations.

The history of this attention to function can be traced to Durkheim (1897/1951) who is often credited with founding functionalism and the distinction between normality and deviance. Durkheim equated normal with the average type and every deviation from this standard was considered to be a morbid phenomenon. Parsons (1951) applied functionalism to health in the 1950s by defining health as “the state of optimum capacity for the effective performance of valued tasks” (Parsons, 1958, p. 168). Illness is viewed as a deviation from the social expectation that a person should be able to perform the functions associated with his or her social role. This perspective has been the basis for health and quality of life indicators and perhaps the bedrock of health status assessment. The norm from which deviation is noted is the productive role of wage labor, school, housework, or ability to care for one’s personal needs. Limitations in major activity, restricted-activity, or cut-down days, bed-disability and work-loss days are examples of indicators based on these roles. A person is “well” or has a higher health-related quality of life if he or she is able to meet the norms or standards for the behaviors that would usually apply to him or her.

Other theoretical developments have strongly influenced the development of studies in health-related QOL, often in conjunction with functionalism. Theories of positive well-being and the theory of utility have spawned long traditions within the health field. Preference-based health-related quality of life measures come out of utility theory in economics and psychophysics in psychology and many hybrid disciplines such as operations research and decision sciences. Both traditions, described more in depth elsewhere in this manuscript, are represented in different types of quality of life measures developed in a health context, including socio-medical indicators, needs-based measures and preference-based measures as well as the so-called generic measures, disease-specific measures, and individualized measures.

*Needs-Based Measures*

Maslow's telic or end-point theory related states of well-being to environmental or ecological systems. In this theory, subjective well-being results when individuals fulfill the needs at their particular levels such as physiological needs, safety needs, love needs, esteem needs, and self actualization needs (Maslow, 1943). This needs-based theory has been the foundation of life satisfaction measured in the health field first developed in the 1950s and subsequently each decade (Hornquist, 1982; Neugarten et al., 1961; Patrick et al., 2000; Wylie, 1970). The needs-based model has received more recent attention as distinguished from health-related quality of life. The needs-based model here applies to disease-specific needs-based quality of life instruments (Doward et al., 2004). Using the needs-value approach, "QOL" measures are created that reflect how a condition interferes with meeting the needs of people with this condition.

*Preference-Based Measures*

Measures of health-related QOL that incorporate explicit values in the ordering of health states are referred to as preference-weighted measures. These measures contrast with those that use statistical weighting to define the magnitude of dysfunction or health of individuals and groups. Preference-based measures are used to calculate "quality-adjusted life years", a term that became prominent in the late 1970s and continues to this day (Weinstein and Stason, 1977). The history of preference-based measures can be read in a number of places including Torrance (1986) and Patrick and Erickson (1993).

*Generic Measures*

Most early health-related QOL measures were generic measures that assess the full range of health and QOL, without focusing on specific areas (Patrick and Deyo, 1989). They are designed for use across a wide variety of populations. Most health-related quality of life measures used in population health monitoring, such as those in the National Health Interview Survey, are generic measures applicable to the general population as summarized annually in Health: United

States. (National Center for Health Statistics, 1975–2004). Perhaps the best-known and most-revered generic health status measure is called self-rated health (During the past month, would you consider your health in general to be excellent, very good, good, fair, poor?). This measure, first used widely by the National Center for Health Statistics, has a distinguished history. This self-rating of health item is often known today as the SF-1 because it is the first item in the Short-Form 36-item Health Survey (SF-36), the most commonly used health-related QOL measure measuring functional status and well-being in use today. The SF-36 itself was drawn from the measure of health status used in the Rand Health Insurance Experiment in the 1980s (Newhouse, 1982) and documented at length in Stewart and Ware (1992).

#### *Disease-Specific Measures*

Specific health-related QOL instruments are designed for application to individuals, conditions or diseases, domains, or populations (Patrick and Deyo, 1989). There are hundreds of such measures available, cutting across most medical conditions, illness domains, or illness populations. Disease-specific measures are often developed with the goal of detecting minimally important changes in condition-specific health-related QOL in longitudinal studies or clinical trials (Guyatt et al., 1986). Minimally important changes are those related to other more well-established anchors, for example joint pain counts and arthritis-specific QOL. Identifying these changes is a major past and current agenda for health-related QOL enquiry (Patrick and Chiang, 2000).

#### *Individualized Measures*

Measures of quality of life and health applied to specific persons have been labeled individualized measures or patient-generated outcomes. These individualized measures allow the individual to identify which aspects of quality of life are most important to them personally and then they are asked to evaluate their status based on these aspects (McGee et al., 1991). One tradition of individualized measures known as the Schedule for the Evaluation of Individual Quality of Life (SEIQoL) derives its cognitive aspects from the

theoretical studies of perception by Egon Brunswik and their extension to Social Judgment Theory by Kenneth Hammond (Joyce et al., 2003).

#### *Patient-Reported Outcomes*

Lumping all the different concepts addressed here as quality of life or health-related quality of life has had socio-political consequences viewed from the political economy of health status measurement. Many investigators and interventionists have claimed that their treatments improve QOL. Using QOL terminology also confuses many persons and studies, because such disparate concepts are included in the term. Thus, the field is moving slowly to the term, patient-reported outcomes (PROs). Patient-reported outcomes address the source of the report rather than the content. PROs are a useful terminology as an organizing tool for the many concepts and applications of self-reports in treatment evaluations (Patrick, 2003). PROs include simple single-concept measures as well as more general measures that capture multiple concepts. The PRO terminology permits primary identification insofar as this information comes directly from the patient and avoids confusion in using one or more concepts as an over-arching term with little specification. Some concepts can be measured from a patient and an observer perspective, e.g., physical function. Others can only be patient-reported, e.g., pain. PROs in daily diary or electronic diary formats may capture daily variations in symptoms or function that can elucidate the mechanism of treatment effects. Finally, using the term PRO requires that the concepts be identified. When using this organizing concept, investigators will need to define and label the content of a specific PRO. Operational definitions of each construct or concept in use are necessary, including specification of the theoretical basis for the concept and how the concept was translated into a measurement, i.e. the mathematical definition of assigning a number to a response.

#### *Forums and the Future*

Health-related QOL is represented not surprisingly most often in health-related journals. Research articles appear in several journals dedicated to QOL including *Quality of Life Research* and *Health and*

*Quality of Life Outcomes.* Many articles on health-related quality of life appear in *Medical Care*, *Journal of Clinical Epidemiology*, *American Journal of Public Health* as well as the myriad of specialty journals. Journals read widely by clinicians such as *British Medical Journal*, *Journal of the American Medical Association*, *New England Journal of Medicine*, and the *Lancet* also increasingly address health-related QOL. The International Society for QOL Research, though assuming a general quality of life label, focuses primarily on health-related QOL research. Health-related QOL also is established within many professional societies, including those that focus on a particular condition and others that cut across many different health conditions such as the Cochrane Collaboration.

Periodically and perhaps increasingly, the lines between general QOL and health-related QOL are blurring, and the traditions have overlapped and informed each other throughout their histories. Currently developing methodologies such as that for characterizing daily experience (Kahneman et al., 2004) and the electronic diary (Palmlblad and Tiplady, 2004) cross-disciplinary lines. The development of the experience sampling method (Csikszentmihalyi et al., 1987) and of ecological momentary assessment (Stone et al., 1999) marks a notable advance in the measurement of quality of life that will influence many different investigators and bring an intermingling of tradition.

The future of health-related quality of life assessment, as addressed in these forums, will likely concentrate on accurate depiction of how health influences and is influenced by the experience of the body and the mind within a social and cultural context. Research on disparities in health status within and across the developed world and developing world also are beginning to merge quality of life with health. Although mortality remains the single most often used concept in addressing these disparities broadly, attention to how people feel and reports of health inform this research tradition.

Accurate depiction can include the characterization of change, and much attention has been and will be put on how to interpret a measure of health-related QOL when it changes. Randomized clinical trials may indicate that change is attributed to a particular treatment. Translating clinical trial results for a health-related QOL measure, however, is a challenge. Similarly when health-related QOL rises or falls at a population level, interpretation of that change and

attribution of its causes—economic, genetic, biological, medical, socio-cultural – is and will be an over-arching challenge.

### HISTORY OF QOL STUDIES FROM A MARKETING PERSPECTIVE (M. JOSEPH SIRGY)

What is the role of QOL research in marketing? In the early 1970s, Albert D. Biderman, a sociologist and a philosopher of science, spoke to a marketing audience and expressed his view that our society has been too preoccupied with material goods and the marketing of these goods. The QOL movement is an attack against what was seen as an econocentric society. It involves an attack on conventional economics as a body of normative theory and analytic methods – in particular, against misplaced confidence in the market as a measure of the value of things (Biderman, 1974, p. 27).

Daniel Yankelovich, President of Daniel Yankelovich, Inc., once underscored the importance of social indicators in business. He cited a few examples (Yankelovich, 1974, pp. 55–56) in which business can do a lot better if and when they use social indicators and QOL measures. Here are a few examples he used:

- A firm's policy, formulated at the highest levels, spells out a philosophy of service to the customer. The policy reflects the knowledge that customer satisfaction is the only sound basis for the company's continuing success. Yet the company's measurement system does not measure service and customer satisfaction. Instead, it measures sales calls, quotas, and other units of efficiency, which may, and often do, conflict with service. Management grumbles about how employees do not seem to care as much as they used to, blind to the fact that their own systems of measurement are undermining their own policies of service – and the morale of their employees.
- A firm gives its employees good salaries and fringe benefits by the standards of its industry. Yet there are widespread signs of worker dissatisfaction – absteneism, high turnover, tardiness, strikes, etc. Company measurements do not take into account satisfaction with the work itself, since in the past this was not as important to employees as financial rewards.

- A government agency concerned with low-cost housing measures the cost per dwelling per family and the number of families housed. It fails to measure the people displaced, the neighborhoods threatened, the fabric of community life disrupted, the isolation of the tenants, and the effects of collecting all the neighborhood delinquents in one convenient location.
- A health-care program measures input variables such as the cost per patient of delivery service, but fails to take into account what the consumer of health-care services wants and needs.

Elliott R. Morss, a political economist, speaking to an audience of marketing scholars about social indicators argued that social indicators have an important role in business (Morss, 1974). Business should systematically collect data to measure the performance of business in four areas: (1) production-related, (2) product-related, (3) political, and (4) social program. The production-related dimension involves environmental impact of manufacturing as in pollution, congestion, local aesthetics, and local land use, as well as worker relations as in wages, working conditions, and hiring practices. The product-related dimension involves product quality and improvement efforts as workmanship, quality control, safety, innovative efforts, societal impact of product, and promotional practices. The political dimension involves reporting on political activities as in political finance reform. The social program dimension involves reporting on community and other social activities that go beyond short-run profit considerations.

Mary Gardiner Jones, former Commissioner of the Federal Trade Commission, argued that the real challenge of contemporary society is to find some method for monitoring regular main stream activities of the business corporation in the production, sale, and promotion of its goods and services. This has to be done to identify and evaluate the impact of these activities in relation to consumer right to privacy, right to a healthful environment, right to safety, etc. Business must develop the methods to predict and take into account in its decision making the consequences of its actions in these broader areas of social concern. Social indicators are essentially a planning tool and an extended system for measuring corporate performance in these broader areas of social concern (Jones, 1974, pp. 110–111).

Drucker (1969) has long maintained that business has a significant impact on society. Therefore, it should be clear to the self-interest of business managers to accept the responsibility to preserve and enhance the QOL in society. The concept of QOL should be built into businesses and into the vision of senior executives. This is most significant for large corporations since they tend to impact society more than small businesses. Business managers should incorporate the concept of QOL into their vision, strategies, and operations for three reasons. First, the penalty for neglecting this area is so very high. Second, business is part of society, and not doing something about the preservation and enhancement of QOL in society will ultimately affect business in adverse ways. That is, a healthy business and a sick society are not compatible. Third, improving the QOL of society should be a tremendous business opportunity.

R. Morton Darrow, former Vice President of Planning and Analysis, of the Prudential Insurance Company of America, once defined corporate social responsibility in terms of a series of cumulative definitions that captures the spirit of the QOL-marketing movement. These cumulative definitions are as follows (Darrow, 1974, pp. 89–90):

- A firm meets its social responsibility by performing its economic role in society of producing goods and services.
- The corporation meets its responsibility by performing its economic function so as to produce quality goods or services at the most efficient costs to maximize consumer satisfaction.
- In addition to the above, the corporation has a responsibility to be a good citizen in the localities where it has factories and offices.
- In addition to the above, corporate social responsibility calls for making short-term sacrifices, such as locating in undesirable areas and employing marginal workers, in order to maximize long-term gains.
- In addition to the above, the corporation must make sacrifices in order to protect the enterprise and the society from disruption, chaos, and eventual destruction.
- In addition to the above, the rapidly changing society is also changing the charter of the corporation. Society, therefore, is redefining the responsibility of the corporation and extending its boundaries beyond the economic zone.

Eugene Kelley, former Research Professor of Business Administration and Dean of the College of Business Administration of Penn State, argued that business planners once had a clear goal: making a profit. Then the goal widened to meet government expectations. Now the firm is viewed in its ultimate environment as a component of the larger societal social system. The goal now is service to society – providing a social purpose for the business enterprise beyond simple profit and legalistic tests (Kelley, 1974, p. 137). Kelley referred to marketing in relation QOL as “socio-marketing”. His concept of socio-marketing has six major elements (Kelley, 1974, pp. 138–139). These are:

- The mission of the business is defined in social system terms of long-run profitable service to the consumer-citizen.
- The firm recognizes that service to the consumer-citizen requires fulfilling societal and environmental concerns as well as the satisfaction of traditional economic goods and services.
- Products are defined as socio-marketing products, not just as economic goods.
- Profit concepts are recognized in their full complexity.
- Organizational commitment to socio-marketing is reflected in prioritized action programs in each area of socio-marketing performance.
- The firm acknowledges that its socio-marketing performance is now, or will be evaluated by external groups.

Seymour Marshak, former executive of the Ford Company, spoke of Henry Ford II. Henry Ford was quoted saying,

In the automobile industry, we have long been accustomed to dealing with organized labor. Now we also are confronted with dealers who are discontented with their relations with the factory, by rebellious customers who are dissatisfied with products and services, and by irate citizens who are disturbed by air pollution, traffic accidents, traffic congestion, and highway construction. . . . Our country is approaching a turning point. The growing spirit of rebellion could ruin us or save us, drag us into chaos or repression, or lead us to greater human freedom than we can now even imagine. The result depends on how we respond to the nearly universal conviction that the world is not as it should be. . . . We must stop thinking about the pursuit of profit and the pursuit of social values as separate and competing business goals. Business earns profits by serving public needs – but profit, not service, is the goal of business. Society gets many of its tasks done by providing profitable market opportunities – but service, not profit, is the goal of society. . . . The important thing

is to stop thinking that the way to increase one is to reduce the other (Marshak, 1974, p. 149).

Mulvill (1978, p. 27) has defined marketing in relation to QOL as follows: Marketing is a total system of business activities that plan, price, promote, and distribute wants-satisfying products and services to customers so that a QOL is delivered to consumers that is culturally and aesthetically rewarding with the least environmental costs.

Finally, MacRae (1985, pp. 357–358), a public policy scholar, expressed much frustration about the fact that basic social scientists (e.g., sociologists, economists, psychologists) failed to produce social indicators that have managerial and policy relevance. He argued that basic scientists have important contributions to make to policy models, but the applied scientists will play a more important role in the future. Institutional innovations are thus required within universities, emphasizing the decision sciences and professional schools together with professional ethics, to provide both better education and more career opportunities for the professionals. Practical issues need to be given equal importance with the theoretical concerns of basic disciplines. More importance must be given to values and knowledge that assist in decision making.

The marketing discipline is one of the technical communities that MacRae is referring to. Marketing is poised to build on the social indicators' movement initiated by the sociologists, the economists, and the psychologists to help develop managerially- and policy-relevant QOL performance measures. These QOL measures should be much more useful and practical to managers and public policy officials. Specifically, the QOL performance measures that marketers can help develop can be very helpful to marketing decision-makers in both the public and private sectors. The goal is to enhance the quality of life of the various "customers" or those various constituencies that organizations serve.

#### *A Traditional View of the Role of QOL Research in Marketing*

QOL research in marketing is social and behavioral science research that supports the concept of QOL-marketing. Then what is the concept of QOL-marketing? Sirgy (2001) argued that QOL-marketing is the business mechanism that plans, prices, promotes, and

distributes economic consumer goods to consumers in ways to maximize consumer well being. Consumer well being is defined in terms of five dimensions of well being: acquisition, possession, consumption, maintenance, and disposition of economic goods. QOL-marketing in relation to each of these consumer well-being dimensions can be articulated as follows:

- Marketing to maximize consumer well being through *acquisition of economic goods*. This type of marketing involves retail institutions making merchandising decisions, pricing decisions, location and in-store place-type decisions, and promotions decisions designed to maximize acquisition utility, i.e., maximize consumer satisfaction with the shopping experience and the purchase of an economic good.
- Marketing to maximize consumer well being through *possession of economic goods*. This type of marketing involves manufacturers of economic goods making product, pricing, distribution, and promotion decisions that maximize possession utility, i.e., maximize consumer satisfaction with the ownership of an economic good.
- Marketing to maximize consumer well being through the *consumption of economic goods*. This type of marketing involves manufacturers of economic goods making product decisions that maximizes consumption utility, i.e., maximizes consumer satisfaction with the use of an economic good.
- Marketing to maximize consumer well being through the *maintenance of economic goods*. This type of marketing involves manufacturers making decisions to enhance the durability of their offerings and service their offerings for maintenance and repair purposes. This type of marketing involves retail institutions and other service establishments making decisions to service and repair economic goods in a satisfactory manner. That is, marketing decisions are made to maximize maintenance utility, i.e., maximize consumer satisfaction with the longevity and continued performance of an economic good.
- Marketing to maximize consumer well being through the *disposition of economic goods*. This type of marketing involves manufacturers making decisions product and/or distribution decisions that can facilitate an environmentally safe disposal of their offerings. This type of marketing also involves retail institutions and service

establishments making decisions to dispose of economic goods in ways that maximizes disposition utility, maximize consumer satisfaction with the disposal of an economic good.

*A Contemporary View of the Role of QOL Research in Marketing*

Sirgy (2001) referred to this view of QOL-marketing as “traditional” because this view limits marketing activities to the world of economic consumer goods. Sirgy (2001) argued that marketing activities is certainly more than that. Does QOL-marketing apply to industrial goods? For example, should manufacturers of industrial goods make marketing decisions that can enhance the well being of their client organizations and society at large. Yes, QOL-marketing activities equally apply to industrial goods. Should nonprofit organizations marketing a non-economic good be concerned with consumer well being? Societal well being? For example, should an academic or professional association be concerned about the well being of its members in selling, let us say, the association’s journals, books, and monographs? Yes, QOL-marketing does equally apply to non-economic goods. How about economic or non-economic services and programs? For example, should an educational institution of higher learning be concerned with student well being in marketing its educational services to students? How about a hospital! Should not a hospital be concerned with the well being of its patients? Should not health care programs and services be designed and marketed in ways to enhance patient well being? All these are marketing issues that should be incorporated in any conception of QOL-marketing. Sirgy referred to this expanded framework as the “contemporary view” of QOL-marketing.

The contemporary view of QOL-marketing shows that any good (economic or non-economic, consumer or industrial), service, or program can be marketed to any one or more of target consumers guided by the QOL-marketing concept. Target consumers can be individual consumers having a specific identifiable demographic, psychographic, or geographic profile. Similarly, the marketing “offering” can be targeted to specific families or households, organizations, communities, and states or countries. The marketing offering is designed, priced, distributed, and promoted in ways to

enhance some specific dimensions (or combination of dimensions) of consumer well being. These well-being dimensions are not limited to consumer well being (defined in the traditional view of QOL-marketing), but also economic, work, family, physical, leisure, social, spiritual, environmental, and political well being. Enhancing one or more well-being dimensions of target consumers (while not decreasing other well-being dimensions of the same consumers and other social entities), in turn, enhances the QOL of the consumers in question.

*The Emergence of the QOL Concept as a Philosophy in Marketing*

Before describing the emergence of the QOL concept in marketing, it would help the reader to know a little about academic scholars in marketing and affiliated disciplines that have organized themselves to facilitate the generation and diffusion of QOL research in marketing and related disciplines. Specifically, this section addresses the following questions: What is the history of organized academic efforts in marketing and related disciplines? How did the QOL concept evolve as a philosophic orientation in marketing thought? How can the growth of the marketing discipline be characterized in terms of the QOL concept? How can growth in social responsibility and ethics in marketing thought be characterized in terms of the QOL concept?

*What is the history of organized academic efforts in marketing and related disciplines?* Marketing scholars first took notice in the early 1970s. H. Naylor Fitzhugh of Pepsi-Cola Company became the first vice president of the Public Policy and Social Issues Division of the American Marketing Association (AMA). Under his leadership, the AMA sponsored a workshop entitled “Social Indicators for Marketing – New Tools for Marketing Management” during the 1971 AMA International Conference in San Francisco (Clewett and Olson, 1974). A second AMA-sponsored “social indicators” conference was held in February 1972 in Washington under the leadership of Irving Crespi of the Gallup Organization and Salvatore Divita of George Washington University (Clewett and Olson, 1974). The third AMA-sponsored “social indicators” conference was held in February

1973 in Washington, D.C. under the leadership of James R. Butts of American University and Allen Clayton of Lever Brothers Company (Clewett and Olson, 1974). Fifteen papers from the 1972 to 1973 conferences were selected and published as a conference proceedings type of publication by the AMA in 1974, and Robert L. Clewett and Jerry C. Olson edited this proceedings (Clewett and Olson, 1974).<sup>3</sup> The fourth “Marketing and Quality of Life” conference was held in 1978, which was also sponsored by the American Marketing Association (Reynolds and Barksdale, 1978). The fifth conference of marketing and quality of life was sponsored by the Academy of Marketing Science and was held in 1985 at Florida Atlantic University (Samli, 1987). The sixth conference was held at Virginia Polytechnic Institute and State University (Virginia Tech) in 1989 and was sponsored by a host of professional societies such as the American Marketing Association, the Academy of Marketing Science, the Association for Consumer Research, the Society for Consumer Psychology (Division 23 of the American Psychological Association), and the International Society for System Sciences (Meadow and Sirgy, 1989). From the seventh conference two special issues were published, one in the *Journal of Business Research* (Sirgy, 1991a), and the other in the *Journal of Business and Psychology* (Sirgy, 1991b). After the seventh conference, the Academy of Marketing Science established the QOL-and-Marketing conference as one of its regular specialty conferences and sponsored the eighth conference in 1992 (Sirgy et al., 1992). From this conference best papers were selected and published in a book (Sirgy and Samli, 1995). The ninth conference was held in Williamsburg, Virginia, USA (local university host was the College of William and Mary) in 1995 and again was sponsored by the Academy of Marketing Science (Meadow et al., 1995). From this conference, two special issues in the *Journal of Business Research* (Chon, 1999) and the *Journal of Macromarketing* (Fisk and Dickinson, 1997) were developed. In 1996, the *Journal of Macromarketing*, under the editorship of Robert Nason has made QOL studies in marketing a regular section in the journal, with M. Joseph Sirgy the section editor.

*How did the QOL concept evolve as a philosophic orientation in marketing thought?* Kotler (1986) has long maintained that marketing thought can be viewed as having evolved historically from a

production orientation, through a product orientation, through a selling orientation, through a marketing orientation, and is evolving towards a QOL orientation (Kotler, 1986).

The *production orientation* holds that “consumers will favor those products that are available and highly favorable, and therefore management should concentrate on improving production and distribution facilities” (Kotler, 1986, p. 14). The *product orientation* posits that “consumers will favor those products that offer the most quality, performance, and features, and therefore the organization should devote its energy to making product improvements” (p. 14). The *selling orientation* holds that “consumers will not buy enough of the organization’s products unless the organization undertakes a substantial selling and promotion effort” (p. 15). Implicit in this orientation to marketing is the notion that the organization has to understand the consumers’ psyche. Based on this understanding, the marketer would use powerful psychological techniques to persuade consumers to adopt the company’s offerings. The *marketing orientation* holds that “the key to achieving organizational goals consists in determining the needs and wants of target markets and delivering the desired satisfactions more effectively and efficiently than competitors” (p. 15).

Kotler (1986) defined marketing effectiveness in terms of the QOL concept: The organization’s task is to determine the needs, wants, and interests of target markets and to deliver satisfactions more effectively and efficiently than competitors in a way that preserves or enhances the consumer’s and the society’s well-being (p. 16). A primary marketing objective of QOL marketers is directed to enhance a well-being dimension of a target segment of consumers. This is done by matching organizational skills and resources in the service of targeted consumers. Thus, QOL marketers develop products, services, or programs that not only satisfy consumers needs, but also enhance one or more dimensions of their well being (Sirgy et al., 1982).

Sirgy and Lee (1995) have used Kotler’s philosophic concepts of marketing thought and matched them against the six P’s of marketing (product, price, place, promotion, prospects, and publics). See Exhibit 3.

The authors argued that the *production orientation* is a marketing strategy that utilizes the price element as a strategic tool for better performance. The emphasis on price is illustrated in the use of the low

cost strategy in marketing practice. That marketing success is a direct function of selling a high quantity of the product at a lower price than the competition. Thus, market share can be increased through lowering price below that of the competition. Market share allows the organization to accumulate experience, which in turn allows the organization to reduce its costs. With lower costs, the firm can afford to reduce prices below the competition and still come out ahead making a profit.

The *product orientation* emphasizes product, i.e., reflects a product strategic focus. This emphasis on product is illustrated in the use of product quality and product differentiation strategies. Here the idea is to examine customers' perception of quality and value and its components. Finding out which product component, if and when manipulated by the firm, would give the firm a competitive advantage.

The *channel orientation* emphasizes place. That is, this philosophic orientation posits that marketing success is a direct function of making channel and distribution decisions. Strategies such as direct marketing, vertical integration, and selective distribution are likely to contribute significantly to the marketing success of the firm.

The *selling orientation* reflects an emphasis on promotion. For example, in many instances creating brand awareness and educating the consumer about the product benefits can make a significant difference in marketing performance. This is particularly true when the product is a technological innovation that has a significant advantage over competitor products. Examples of marketing strategies include mass media advertising, sales promotion, trade promotion, and personal selling and sales management.

The *marketing orientation* puts much emphasis on existing and potential customers, i.e., prospects. That is, marketing success can be attributed to efforts at focusing on a specific target market and delivering satisfaction. Examples of typical marketing strategies consistent with this philosophic orientation include focus strategy, relationship marketing, customer satisfaction, and customer value perception.

The *societal marketing orientation* posits that marketing success is likely to be mostly based on serving the many stakeholders of the firm and balancing their demands. The focus here is on publics, i.e., various stakeholders of the organization. Examples of

marketing strategies consistent with this philosophic orientation include green marketing and QOL-marketing. Green marketing is a strategy that focuses on developing and delivering products to target consumers in a manner that is environmentally friendly. QOL-marketing, on the other hand, is a strategy that focuses on enhancing the well being of target consumers while preserving the well being of all other stakeholders of the firm that are affected through the process and/or outcomes of serving target consumers.<sup>4</sup>

The authors argue that marketing has evolved from a production orientation (a philosophy grounded in classical economic theory) and moved toward a societal marketing orientation. This evolution can be attributed to four factors. First, there is a growing recognition by marketing executives that their responsibilities lie not only with one constituency, namely the stockholders, but also with other constituencies such as customers, workers, suppliers, distributors, management, local communities, the environment, among others. Second, marketers have recognized that the scope of exchange should be broader. That is, the exchange cannot be viewed strictly in terms of dyadic, economic transactions. They have to be viewed and understood in terms of generic and expanded relationships. This is because the environment of marketing is increasingly becoming complex. Third, marketing managers have increasingly viewed business contingencies from a macro perspective. That is, the emphasis has increasingly focused on social responsibility and society's well being. This view complements the traditional micro perspective of profit making. Finally, marketers have increasingly realized the need to adopt a long-term orientation with target consumers and other stakeholders of the firm.

*How can the growth of the marketing discipline be characterized in terms of the QOL concept?* Sirgy and Morris (1987) conceptualized the growth of the marketing discipline in relation to QOL as follows. It was posited that the growth of the marketing discipline as a societal institution is accompanied by *greater interdependence and coordination of the marketing discipline and other societal institutions*. The goal of interdependence and coordination among societal institutions is the enhancement of QOL of society. This is further conceptualized in terms of long-term life satisfaction and the knowledge of actions designed to attain long-term life satisfaction. Greater interdepen-

dence and coordination of the marketing discipline with other societal institutions was further conceptualized in terms of eight dimensions: (1) role content, (2) role globalness, (3) role collectivity, (4) locus of standards, (5) role congruence, (6) role certainty, (7) time orientation, and (8) role value.

With respect to *role content*, it was argued that evidence of the growth of the marketing discipline in relation to QOL is reflected in the changes in marketing role content. Modern marketing has been increasingly concerned with the marketing interface with society reflecting greater interdependence and coordination of the marketing institution with other societal institutions. For example, the increasing role of social marketing, macromarketing, relationship marketing, QOL-marketing, and marketing and public policy are all indications of greater concern with social and societal issues.

It was also argued that evidence of the growth of the marketing discipline in relation to QOL is reflected in the changes in marketing *role globalness*. Traditional marketing has been mostly concerned with economic and business exchanges. In contrast, modern marketing has been applied to a variety of economic, business, technological, political, environmental, and cultural problems. These new concerns reflect greater role globalness of the marketing discipline.

Furthermore, evidence of the growth of the marketing discipline in relation to QOL is reflected in the changes in *role collectivity*. Traditional marketing has been mostly concerned with marketing to satisfy the demands of the management and the stockholder (i.e., profit maximization). In contrast, modern marketing acknowledges the demands of a variety of stakeholders such as employees, customers, suppliers, distributors, government, community, and the environment.

Evidence of the growth of the marketing discipline in relation to QOL is reflected in the changes in *locus of standards* too. Traditional marketing has relied heavily on rules of conduct, code of ethics, and professional standards from other disciplines as economics, management, sociology, and psychology. In contrast, contemporary marketing has its own internally-derived standards guiding the practice of marketing as a professional endeavor.

Changes toward greater *congruency* between marketers' public and private images of themselves reflect greater interdependence and

coordination of the marketing institution with other societal institutions and hence greater QOL. In the past, the public has held an image of the marketer as that of the “huckster”. This public image has changed to reflect a higher level of professionalism. Modern marketers now, more than ever, see themselves in a more positive light that is consistent with society’s view of them.

With respect to *time orientation*, it was argued that the growth of the marketing discipline in relation to QOL is evidenced by a shift from short-term orientation to a long-term one. The increasing acceptance of long-term profitability through relationship marketing is an example.

*Role certainty* deals with the extent to which marketers view the marketing discipline as a professional discipline with established theories, models, and methods guiding marketing practice as a “science”. There is increasing evidence to suggest that this is the case – the greater the marketing role certainty the greater the interdependence and coordination of the marketing institution with other societal institutions, and hence the greater the QOL.

*Role value* refers to the notion that all professionals have their own value system. For example, the social worker has a value system grounded in the concept of the “just society” and “human welfare”. The clinical psychologist has a value system grounded in the “subjective well-being”. Have marketers established their own value system? The increasing acceptance of the marketing and societal marketing concepts involving customer satisfaction and well being is evidence of growth in role value of the marketing profession.

*How can growth in social responsibility and ethics in marketing thought be characterized in terms of the QOL concept?* Another conceptualization of the emergent QOL philosophy in marketing is Samli’s (1992) conceptualization of “proactive marketing”. Samli, one of the more prolific authors in QOL research in marketing, argued that proactive marketing is socially responsible marketing (or QOL-marketing). It is the kind of marketing in which products and services are developed and marketed through a system of internal and external controls, which are designed to ensure that both consumers and the environment are best served. It was argued that proactive marketing is an emergent concept from reactive marketing, which in turn is superseded by inactive marketing and negative marketing,

respectively. Negative marketing can be characterized as organizational actions in the commercialization of products that cause adverse effects to one or more publics. It is marketing to maximize profit at any cost (as long as these costs are legal). Hence, negative marketing is guided by a legalistic notion. Inactive marketing can be characterized as organizational inaction in situations in which social responsibility is warranted. The organization does not act to do the right thing, e.g., to provide redress in grievance cases.

#### *Concluding Remarks*

The growth of the marketing discipline and the evolution of the QOL concept in marketing thought are important markers in the history of marketing, administrative, and policy sciences. The growth and acceptance of the QOL concept in marketing and related disciplines is important in that professionals in all kinds of organizations are more likely than ever to adopt the QOL concept as a point of reference. This point of reference or philosophy serves to guide their decision making in the service of the various organizational stakeholders, e.g., customers, suppliers, distributors, creditors, employees, the local community, and the environment. Doing so would benefit society significantly.<sup>5</sup>

#### HISTORY OF QOL STUDIES FROM AN INDUSTRIAL/ ORGANIZATIONAL PSYCHOLOGY AND MANAGEMENT PERSPECTIVES (M. JOSEPH SIRGY)

Historically, research and writing in quality of work life (QWL) has been the turf of organizational behavior scientists and management scholars (e.g., O'Brien, 1990; Tait et al., 1989). QWL sprung from the humanistic theories of Argyris (1957), McGregor (1960), Maslow (1954) and Likert (1961), all of which emerged following the Hawthorne studies and the Human Relations Movement (see Schermerhorn et al., 1994).

In some sense, the Relay Assembly Test Room experiment of the Hawthorne studies (see Schermerhorn et al., 1994) is the first study to account for increased productivity in terms of quality of life in the work setting. The experiment was conducted in 1927 by a group of

researchers from Harvard University, led by Elton Mayo, whose objective was to establish the effects of worker fatigue on productivity. In this study, six operators who assembled relays were isolated for intensive study in a special test room. The operators were subjected to various rest pauses, length of workday, and length of workweek, while their productivity was regularly measured. The outcome was that overall, the productivity of the relay assemblers increased overtime, regardless of the specific changes made in the work setting by the researchers.

The researchers, Mayo and his colleagues, concluded that the new "social setting" created in the test room accounted for the increased productivity. Two factors in particular were singled out. First, there was positive group development. That is, the operators shared both good social relations with one another and a common desire to do a good job. Second, supervision was more participative than that otherwise experienced by the operators. In the test room, the operators were made to feel important, given much information, and frequently consulted for their opinions on what was taking place, which was not the case in their normal work situation. In other words, one might say that the increased productivity of the relay assemblers in the test room was possibly a function of the higher level of QWL (being consulted by their supervisor and having meaningful interactions with their colleagues), which they enjoyed in the test room but not in their regular work setting.

The Human Relations Movement emerged following the Hawthorne studies underscoring the creation of good human relationships between managers and subordinates. Argyris (1957) further focused on the relationship between individuals and organizations. He argued that the formal organization is based on specific concepts of rationality and division of labor and specialization to the extreme, and thus does not provide the individual with channels for self-fulfillment. The individual adapts to this in various ways including apathy and non-involvement. Management realizing the apathy reacts by increasing the amount of control on the individual. But this of course only makes the problem worse. The way out of this vicious circle is to try to provide the satisfaction of people's need for self-actualization in their work. This is a prime concern for the workers' QWL. Argyris advocated specific steps that should be taken to achieve it.

1. *Decreasing the conflict between the individual and the organization:* This may be achieved if the formal structure of the organization is changed to allow the worker/employee to experience more activity than passivity; greater relative independence than dependence; a longer rather than a shorter time perspective; and finally be in an equal if not higher position than his/her peers.
2. *Job enlargement:* This is understood in either or both of two ways: (a) increasing the number of tasks that the individual has to perform, and (b) giving the individual more control over his/her environment.
3. *Participative or employee-centered leadership:* The individuals/employees who make up and keep the organization alive, must enjoy self-expression in the organization. The present organizational structure will have to be modified if group-centered leadership is to exist. No longer would a few individuals be responsible for defining the group's goals, evaluating its behavior, and providing direction, rewards and punishments. The activities would be handed over to the group. Argyris quotes instances where these changes have been instituted into organizations with a resultant increase in productivity and individual growth and self-involvement.

McGregor (1960) was among the first management scholars to underscore the concept of QWL. McGregor described two styles of management he termed Theories X and Y. Theory X managers believe that workers in general are lazy, dislike responsibility, are self-centered, and are motivated strictly by extrinsic rewards (e.g., money). Hence, managers should allocate a lot of energy toward directing and controlling people, and organizing the elements of productive enterprise. Theory Y managers, on the other hand, believe that workers are inherently *not* lazy. Rather, they are responsible and industrious. They enjoy mastery of creativity and achievement. They are motivated mostly by intrinsic rewards (e.g., a sense of self esteem, a sense of belongingness, a sense of social recognition, and a sense of self-actualization). Managers who believe in the central tenets of Theory Y focus their efforts to allow workers to achieve their individual goals while working toward organizational goals. This attention to the satisfaction of workers' needs through organizational means has been

the impetus behind the QOL movement in management thought and practice.

Similarly, Blake and Mouton (1964, 1969) underscored the significance of greater productivity and satisfaction that could be attained through 9.9 managerial behavior – characterized by simultaneous and maximum concern for people and productivity. The issue is how can managers achieve performance and human resource maintenance.

In the following sections, we provide a brief overview of the research literature dealing with QWL. We organized the review by addressing a series of important questions. These are: Does QWL contribute significantly to QOL? How does quality of work life contribute to overall QOL? What are other consequences of QWL? What are some factors affecting QWL? How to develop/apply QWL programs?

#### *Does QWL Contribute Significantly to Overall QOL?*

Andrews and Withey's (1976) measure of QWL (the Efficacy Index) was found to be significant and a very strong predictor of life satisfaction. The study controlled for the effects of family, money, amount of fun one is having, house/apartment, things done with family, time to do things, spare-time activities, recreation, national government, and consumer. Campbell et al. (1976) showed that satisfaction with work contributes approximately 18% variance accounted for in life satisfaction, controlling for the effects of non-working activities, family life, standard of living, savings and investments, marriage, friendships, and housing. In most QOL studies, attitude toward work closely linked to life satisfaction (e.g., Schmitt and Bedian, 1982; Shaver and Freedman, 1976). Furthermore, early research on self-esteem and job satisfaction among salespeople established the link between them (e.g., Bagozzi, 1978, 1980a, 1980b, 1980c).

#### *How Does QWL Contribute to Overall QOL?*

There are a number of psychological strategies that people use to maximize satisfaction (and minimize dissatisfaction) across a variety of life domains. These are spillover, segmentation, and compensation (e.g., Rain et al., 1991; Staines, 1980; Wilensky, 1960).

The *spillover effect* refers to the process and outcome by which affective experiences in the work life domain influence the affect experienced in other life domains and overall life, and conversely one's overall life satisfaction/dissatisfaction spills over to the job domain. Studies (e.g., Champoux, 1976; Dreher, 1982; Martin and Schermerhorn, 1983; Near, et al., 1980; Staines, 1980; Rice et al., 1980; Rousseau, 1978) indicate that the positive relationship predicted by the spillover model is generally supported.

The *segmentation effect* refers to the method by which people isolate experiences and affect in one life domain, thus preventing affect transfer between life domains. For example, a person is said to "segment" when he manages to leave his work troubles and concerns at the office and not bring these with him at home. He says to himself, "Work is work and home is home. I deal with work only when I'm at work, and I deal with others when I'm away from work. I don't think about work when I'm away from my office. And I don't bring my family troubles to work either." Thus, affect experienced in one life domain such as work becomes independent from affect experienced in other life domains. Empirically speaking, such a phenomenon is evidenced through a lack of correlation between satisfaction in one life domain (e.g., job satisfaction) and other life domains (e.g., leisure satisfaction, family satisfaction, life satisfaction).

The *compensation effect* refers to the method by which people attempt to balance their affect across life domains. For example, a person who feels quite dissatisfied with his job may try to channel much of his energy to feel good in other areas of his life. He may channel his energy into religion, family, sexual relationships, leisure, and so on. Doing so "compensates" for the dissatisfaction he experiences on the job. Thus, the person attempts to create balance in affect across domains. If he experiences negative affect in one life domain, the person becomes motivated to engage in activities to increase positive affect in other domains to ensure a minimum level of overall life satisfaction.

#### *What Are Other Consequences of QWL?*

Russell Ackoff, emeritus professor of operations research and systems science at University of Pennsylvania, has written a book that argues that QWL is the answer to America's corporate world

(Ackoff, 1994). That is, if corporate management focuses its efforts to enhance QWL, the result will be significantly higher profits. Ackoff conceptualizes the business enterprise as a social system producing and distributing wealth and raising the standard of living. The QWL within a social system is the key to business success. Work can be designed to be challenging and enjoyable. Doing so would increase workers commitment to the organization and the motivation to excel and achieve excellence.

Study after study has shown that a happy employee is a productive employee (Greenhaus et al., 1987). A happy employee is a dedicated and loyal employee. Much research has shown that QWL may have a significant impact on employee behavioral responses such as organizational identification, job satisfaction, job involvement, job effort, job performance, intention to quit, organizational turnover, personal alienation (e.g., Carter et al., 1990; Efraty and Sirgy, 1990; Efraty et al., 1991; Lewellyn and Wibker, 1990).

#### *What Are Some Factors Affecting QWL?*

Much research has been done in this area, especially in job satisfaction (for excellent reviews of the research literature on job satisfaction see Jayartne, 1993; Locke, 1976). Examples of significant factors from QWL research are job design, performance feedback, participation in decision-making, role clarity, compensation package, total quality management, employee-organizational time congruity, teamwork, personal motivation, age, and information technology.

#### *How to Develop/Apply QWL Programs?*

QWL research has identified three major types of QWL interventions. These are alternative work arrangements, employee involvement, and job design. With respect to *alternative work arrangements programs*, the goal is to help employees balance the demands of their work and non-work lives. Common programs are those that manipulate work arrangements such as full-time work-at-home, part-time work-at-home, flextime, compressed work week, and part-time work

arrangements (e.g., Duxbury and Haines, 1990, 1991; Ronen, 1981; Schermerhorn, et al., 2003).

*Employee involvement programs* are interventions that aim at increasing workers' input into decisions that affect organization performance and employee well being (Glew et al., 1995). They allow greater employee participation in workplace decisions. These involvement programs have been referred to as "empowerment", "participative management", "work design", "industrial democracy", and "QWL programs" (Cummings and Worley, 2001).

*Job design* is the process of defining job tasks and work arrangement to accomplish them. This process may determine the amount of intrinsic satisfaction that workers experience at work. As noted by Schermerhorn et al. (2003, p.153), the best job design is always one that meets organizational requirements for high performance, offers a good fit with individual skills and needs, and provides opportunities for job satisfaction. Enriched job design aims to enhance one's motivation to work as prescribed by Herzberg's Two-Factor theory (Herzberg, 1967, 1968) and the Job Characteristics model (Hackman and Oldham, 1980). Two-factor theory differentiates hygiene factors (or dissatisfiers that are in the job context or the environment in which people work such as pay) from motivators (or satisfiers that are in the job content – the actual work that people do). Examples of motivators are work opportunities for achievement, recognition for good performance, work itself, responsibility, and advancement and growth. Building motivators into the job enriches the job and increases worker satisfaction and motivation to work. Thus, the theory prescribes a strategy of job design that is distinctly different from job simplification. Herzberg prescribes job enrichment that involves vertical loading – increasing job depth through building additional motivators into the job content. Thus, job enrichment can help satisfy higher-order needs and enhance workers' QOL. For discussion of the basic application steps for job enrichment (see Hackman and Oldham, 1980; Hackman et al., 1975; Walters, 1975). A brief discussion of these is reported by Cummings and Worley (2001).

### *Concluding Remarks*

As we have seen from this overview, there is a great deal of research in QWL that can assist managers and policy makers in developing

programs and policies to enhance general QOL. For managers and policy makers who are “economy-minded,” QOL research has established that the consequences of QWL programs are not limited to QWL enhancement. QWL programs contribute to employee job motivation and job performance, employee loyalty and commitment to the organization, low turnover rate, lower rates of employee absenteeism, and lower strife between management and labor. Managers can enhance QWL by a host of programs and activities such as:

- Providing employees with prompt performance feedback,
- Allowing employees to participate in important decisions that affect the health and welfare of the entire organization,
- Establishing role clarity,
- Meeting employees’ informational and motivational needs,
- Compensating employees well,
- Compensating employees fairly and equitably,
- Using alternative work arrangement to balance the demands of work and non-work domains,
- Designing jobs that satisfy individual needs,
- Matching job design with employee needs,
- Assigning workers low in social and growth needs to routine jobs,
- Assigning workers high in social but low in growth needs to traditional work groups,
- Assigning workers who are low in social but high in growth needs to enriched jobs,
- Assigning workers who are high in social and growth needs to self-managed teams, and
- Using of information technology to facilitate performance and enhance productivity.

#### THE QOL RESEARCH MOVEMENT: A FORECAST OF THE FUTURE (M. JOSEPH SIRGY)

We believe that QOL studies as a field of scientific research will grow substantially into the future. This growth may be due to the growth of research jobs directly related to QOL studies.

*The Job Market*

We believe that QOL research-related jobs will be created in *both* academic and nonacademic sectors.

*Academic jobs.* With increasing popularity of QOL studies and acceptance of QOL research as a research paradigm in the traditional academic departments (e.g., psychology, sociology, economics, management, marketing, hospitality and tourism management, leisure studies, health sciences, environmental sciences, urban affairs, design and architecture, among others), more faculty in the traditional academic departments are likely to engage in QOL research. Competition among academic departments for visibility and reputation through publications in the most prestigious journals of the academic disciplines is likely to prompt some academic departments to capitalize on their strengths and position themselves as QOL research powerhouses and think tanks. This may occur through establishing centers within academic departments, colleges, or universities. With increasing success of these centers through grants and research contracts, demand for faculty positions within these centers will drive other faculty to specialize in QOL studies to compete for these jobs. Furthermore, doctoral students interested in social and measurement issues within their own academic disciplines are likely to engage in QOL research and publish in this area to gain a competitive advantage in the academic job market.

Acceptance of QOL research as a research paradigm in the traditional academic disciplines also means that QOL research will be captured by textbook authors in general courses, which in turn further will develop into specialized textbooks focusing on specialized courses. Or the reverse process is possible. Research in QOL is captured in specialized books and textbooks prompting faculty to create course curricula. In time, the increasing popularity of these specialized books and academic courses find themselves in the general textbooks of the discipline and the general course curricula. Introduction of specialized courses reflecting QOL research should increase demand for faculty positions with expertise in QOL research. For example, in many general management textbooks, authors typically devote an entire part of the book (i.e., several

chapters) describing research dealing with business and society issues. Gradually management departments have offered courses in business and society. QOL research in management (e.g., quality of work life, consumer well being) play an important role in business and society issues. Further acceptance of QOL research in management is likely to prompt some faculty specializing in this area of research to write textbooks in this area, which in turn may induce management departments to offer specialized graduate-level courses in QOL issues in management. Introducing a specialized course related to QOL research in management may likely be possible if a faculty member having expertise in this area were to express a desire to teach such a specialized course. Once a specialized course in QOL research in management is introduced as part of the academic curriculum, it may take a life of its own. That is, the head of the management department (or departmental recruiting committee) may feel undue pressure to staff this course, which puts pressure on finding other faculty members that have expertise in QOL research in management. This pressure is likely to translate into a job search for faculty candidates having expertise in QOL research in management.

*Non-academic jobs.* We believe that with increasing acceptance of QOL research in academe, much of this research will eventually become increasingly applied in orientation and focused on specific industries and institutional sectors of the economy. Much research in health-related QOL research has produced many books targeting the pharmaceutical industry, such as Joyce A. Cramer and Bert Spilker's book on *Quality of Life and Pharmacoeconomics* (Cramer and Spilker, 1998). These types of books popularized in the pharmaceutical industry have caused pharmacological researchers specialized in testing the effectiveness of drugs to adopt QOL methods and measures. Eventually, we foresee a cadre of QOL researchers conducting outcome assessment studies in clinical trials of all kinds of pharmacological products. That is, the increasing acceptance and adoption of QOL methods and measures in pharmacological research is likely to create many jobs reflecting QOL specialization.

In the healthcare field, we see increasing proliferation of health-related QOL research published in books directed to medical

practitioners. Examples include *Individual Quality of Life: Approaches to Conceptualisation and Assessment* (Joyce et al., 1999), and *Improving Health in the Community: A Role for Performance Monitoring* (Institute of Medicine, 1997). The focus of these books is to not treat the disease and disease symptoms. Instead, performance measures should capture the effectiveness of medical therapies in relation to the patient as a whole, his/her life quality. More recently, a book written by Rapley (2003) (*Quality of Life Research*) has focused on QOL assessment of medical interventions targeting people with disabilities. This type of research and practitioner-oriented books are likely to further increase the use of QOL methods and methods in medical research prompting medical facilities and establishments to hire medical research with expertise in QOL research.

In relation to economic development and community/urban planning, many communities and regions have increasingly performed QOL studies in their designated geographic regions. Economic development officials and community planners no longer document economic outcomes (e.g., number of job gain/loss in the region) but focus on a host of economic, consumer, environmental, health, and social indicators to describe the QOL of the area. These people had to learn much about QOL research and sustainable development. There are many practitioner books dealing with sustainability indicators. Examples include *A Survey of Sustainable Development* (Harris et al., 2001), *Toward Sustainable Communities* (Mazmanian and Kraft, 1999). Many research practitioners are involved in community planning network through the International Sustainability Indicators Network (ISIN). There is an increasing recognition that research involving urban and regional indicators necessitates people who are well versed in QOL research, and therefore the demand for these jobs is on the increase. Similar developments are occurring in other institutional sectors such as travel and tourism (the eco-tourism/sustainable tourism movement), human resource management (quality-of-work life, empowerment, the high involvement organization, human relations), and marketing (the relationship marketing, green marketing, sustainable marketing, social marketing, and consumer well being, QOL marketing). These research movements are creating enough

momentum that in due time we are likely to see demand for jobs in these areas.

#### *Factors Affecting the Job Market*

We can analyze the changing environment of the QOL-job market by focusing on political, economic, social, and technological environments.

*The political/legal environment.* Politically, pressure will grow significantly to force public officials to address QOL issues. The political pressure will encourage public officials to make demands on institutions of higher learning and societies directly related to QOL studies. Such demands may be in the form of developing curricula and training people to become experts in QOL related issues such as sustainable development.

For example, the Canadian Parliament (House of Commons) has recently passed a resolution calling for the development of a Canada Well-being Measurement Act (Motion M-385). This motion states "... that in the opinion of this House, the government should develop and report annually on a set of social, environmental and economic indicators of the health and well-being of people, communities and ecosystems in Canada" (see Hansard for June 2, 2003 at the Government of Canada Web site or <http://www.SustainWellBeing.net/7GI/Hansard-June2-03.shtml>). This is legislation that addresses the problems associated with guiding public policy using antiquated and over-emphasized economic indicators. The legislation should force the government to collect data on the overall QOL of the nation, i.e., economic, consumer, environmental, health, and social indicators. The "Measuring Well-being" link at <http://www.SustainWellBeing.net> provides extensive detail about the institution and the campaign. It is very likely that other countries will follow suit and establish national statistical bureaus that collect QOL data.

Furthermore, we see how changes in the legal environment of specific industries drive the job market in specific industries such as pharmaceuticals. For example, in the United States, tougher "truth in advertising" regulations have been developed by both the

Federal Trade Commission and the Food and Drug Administration. These two agencies oversee the advertising of the large pharmaceutical firms. Pharmaceutical firms would like to claim that their drugs could improve the QOL of certain people afflicted with certain diseases or disabilities. The tougher rules related to truth in advertising dictate that these message claims have to be supported by scientific evidence. That evidence can come only from clinical studies in which the effectiveness of the drug in question is tested using QOL methods and measures. Thus, the R&D departments of pharmaceutical companies are likely to employ researchers with increasing level of sophistication in QOL research.

Politicians run their campaign by making promises to enhance the QOL of their constituencies. Such message claims were considered implicit and not needing corroborating evidence. However, as citizens become increasingly aware of the growing field of QOL studies and understand that QOL is indeed a measurable phenomenon, they are likely to exert pressure on the politicians to prove their claims. Doing so will in turn more exert pressure on the politicians to demonstrate their effectiveness by employing QOL data. Therefore, demand for QOL researchers is likely to increase to gather these kinds of data. Employment is a very significant issue in political campaigns. The work environment in many communities and regions around the world has changed and will continue to change in relation to the workers and workers' rights. Citizens increasingly feel that they have a right to employment. They demand jobs. Not only do they demand jobs but high quality jobs. The concept of "high quality jobs" falls in the domain of QOL research. QOL researchers with a labor economics background have long investigated this phenomenon. Quality jobs are not simply high-paying jobs. They are jobs that satisfy many aspects of basic as well as growth human needs. Thus, we predict that demand for QOL researchers specializing in this area is likely to increase significantly in the future.

*The economic environment.* The consumerism and environmentalism movements have matured significantly over the last decade or two. The culture is changing to accept certain realities that this planet cannot survive by strictly focusing on economic development at the

expense of the environment. Consumers are increasingly becoming sensitive to issues of product safety and environmental pollution. In a nationally (USA) representative poll of 1000 adults, surveyed online between August 13 and 18, 2003, 80% of Americans said that whether or not a product is safe for the environment does influence their decision to buy that product. Furthermore, 70% said they are more likely to buy a product if the company that makes it is known to implement environmentally friendly practices in its business. More than 57% percent said that they buy recycled or environmentally safe products (Gardyn, 2003). Economically, consumers will demand that the goods and services they buy should contribute directly to their QOL. They will also demand that the production, distribution, and consumption of the same goods and services should not create adverse effects on the local community, the environment, and other stakeholders. Thus, one can argue that the consumer and environmental movements have exerted and will continue to exert pressure on business to become increasingly socially responsible. Heightened corporate social responsibility is very much related to the QOL research movement. This is because corporate executives are likely to employ QOL researchers to assess the firm's impact on the QOL of consumers and the environment. Assessment of corporate social performance should play an increasingly important role in corporate strategy.

Furthermore, managers in large firms are beginning to discover that their most important asset is their employees. To maintain a high level of organizational performance and enhance employee retention, managers will have to cater to the employees and develop quality-of-work life programs. Doing so will necessitate recruitment of human resource managers well versed in QOL Studies. The development and testing of the quality-of-work-life programs necessitate expertise in QOL research. Hence, more QOL researchers are likely to be hired as organizational psychologists doing human resource management research. Furthermore, the labor movement has made workers increasingly aware of their rights in relation to the work environment and corporate policies dealing with jobs. Workers are increasingly protective of their rights. Furthermore, workers expectations concerning work have changed significantly and will continue to change in the future. Work is no longer viewed as a means to earn a living. Work is a lifestyle.

Through work, people satisfy many of their basic and growth needs. The increasing pressure to treat work as a means to fulfill one's career aspirations will continue to exert pressure on employers to attend to quality-of-work-life issues and concerns. Thus, the expertise of QOL researchers is likely to be increasingly recognized by employers.

*The demographic environment.* The size of the elderly population will increase significantly. The baby boomers are now turning elderly. One estimate puts the size of this population at 78 million in the U.S. alone (American Demographics, 2002). QOL concerns are more important for the elderly than their younger counterparts. This concern will translate into social and cultural pressure on government and business to address QOL issues. Many gerontologists have turned to the field of QOL studies to address the growing QOL concerns of the elderly. Gerontologists with QOL research expertise have risen in numbers and have become increasingly specialized. There are now medical gerontologists (medical researchers focusing on health and disease of the elderly), marketing gerontologists (marketing researchers and consultants focusing on guiding business strategy to cater to elderly consumers), food and nutrition gerontologists (QOL researchers focusing on the QOL impact of certain foods and food related products and programs), physical therapy gerontologists, media gerontologists, and leisure gerontologists, among others.

Developed countries are experiencing lower rates of reproduction than developing countries. Women in the developed countries are increasingly delaying marriage and starting a family. They have less children than in the past. Increasing development brings about a shift in focus, from basic needs to growth needs. This translates into an increasing trend related to QOL issues and concerns. QOL research is highly adept in addressing issues and concerns dealing with higher-order human needs.

*The technological environment.* Technologically, products will become increasingly high tech. The effects of high tech products are more complex necessitating a more holistic approach to planning and design as well as commercialization. Thus, demand for pro-

professionals with skills dealing with QOL issues will increase significantly. Firms developing high tech products will engage increasingly in marketing research to develop and modify those high tech products to fit people's lifestyles and enhance their QOL. Many technology research labs around the globe are developing high tech products targeting to certain population groups. AgeLab at MIT is an example of such a technology research organization specializing in developing high tech products for the elderly. Among the products AgeLab has developed there is a lightweight "space suit" for the elderly that can monitor their health and help them move without walkers. Or how about the personal emergency response systems? The elderly needing assistance can click on a pendant or wristwatch that taps into a support system. The support system involves a virtual service that brings service providers together in a network that uses the Internet as a base. This system allows companies to offer all kinds of services to the elderly, not only emergency physical assistance but also nutrition with health monitoring, food shopping, among others (American Demographics, 2002).

Such high tech devices require testing using QOL methods and measures. As products and services become increasingly high tech, firms developing these products and services will have to employ marketing researchers that have expertise in QOL research.

#### *Training Scientists for the New Jobs*

To meet the growing demand of the job market in QOL studies, institutions of higher education are likely to respond to that demand by making systematic changes in organizational structure and the teaching, research, and service missions of faculty who are experts in QOL studies.

*Organizational structure.* Universities, especially research-oriented universities world-wide, are likely to meet the growing demand of jobs requiring expertise in QOL studies by establishing QOL studies centers and programs initially, and in the distant future possibly academic departments, schools, or colleges to correspond to other traditional academic disciplines such as psychology, sociology, economics, political science, management, and

marketing. Many universities have established centers within their colleges and departments engaging in QOL research. Examples include:

- The Office of QOL Measurement, Virginia Tech, USA (<http://marketing.cob.vt.edu/sirgy/library/iqolm/iqolm.htm>),
- The Center for Survey Research at Virginia Tech, USA ([www.vt.edu:10021/centers/survey/index.html](http://www.vt.edu:10021/centers/survey/index.html)),
- The World Database of Happiness, Erasmus University, The Netherlands ([www.eur.nl/fsw/research/happiness](http://www.eur.nl/fsw/research/happiness)),
- Center for Survey Research and Methodology/Social Indicators Department at University of Mannheim, Germany ([www.zumamannheim.de/data/social-indicators](http://www.zumamannheim.de/data/social-indicators)),
- The Australian Center on Quality of Life, Deakin University, Australia (<http://acqol.deakin.edu.au/index.html>),
- The QOL Research Institute, University of Girona, Spain Girona ([www.udg.es/irvq](http://www.udg.es/irvq)),
- Subjective Well-Being Laboratory, University of Illinois-Urbana, USA ([www.psych.uiuc.edu/~ediener](http://www.psych.uiuc.edu/~ediener)),
- The Global Development and Environment Institute, Tufts University, USA (<http://ase.tufts.edu/gdoe>),
- Institute for Social Research, York University, Canada ([www.math.yorku.ca/ISR/menu.htm](http://www.math.yorku.ca/ISR/menu.htm)),
- Institute for Social Research and Evaluation, University of Northern British Columbia, Canada ([www.unbc.ca/isre](http://www.unbc.ca/isre))

Not only QOL research is conducted through these centers, these centers provide the basis to establish educational programs. Masters-level programs are likely to be offered through university centers specializing in QOL research. We are likely to see such educational programs proliferate in the future. However, what is more likely to occur is that graduate students within their own academic disciplines working at these centers will gain experience and expertise in QOL research, which will help them compete for QOL research jobs in academic and non-academic institutions.

*The teaching mission.* The growing demand of the job market may result in developing degree programs and course curricula to train students in this growing field of specialty. With respect to degree

programs, institutions of higher learning may develop graduate-level degree programs in QOL studies – masters of science and possibly doctorate degrees.

With respect to course curricula, QOL studies courses taught at the graduate level may include the following research topics:

- Subjective well-being.
- Leisure well-being.
- QWL.
- Family QOL.
- Community QOL.
- Spiritual well-being.
- Consumer well-being.
- Housing well-being and neighborhood QOL.
- Urban development and QOL.
- Regional development and QOL.
- National accounts, social indicators, and QOL.
- Quality of life of the elderly.
- Quality of life of the poor.
- Quality of life of children and adolescents.
- Comparative studies of QOL.
- Sustainable development.
- Media and QOL.
- Arts, culture and QOL.
- Business and QOL.
- Education and QOL.
- Government, politics, and QOL.
- History and systems in QOL studies.
- Methods and measures of QOL.
- Theory in QOL studies.
- Ethics and QOL studies.

Faculty housed in psychology departments are likely to offer graduate-level courses in subjective well-being. Faculty housed in consumer economics departments are likely to offer courses in consumer well being. Faculty housed in leisure studies departments are likely to offer courses in leisure well being. Faculty housed in management departments are likely to offer courses in QWL. Offering QOL courses is important for training graduate students in QOL research.

*The research mission.* The growing demand of jobs in QOL studies may result in faculty research specialization. That is, faculty housed within their academic units are likely to specialize in areas of research reflecting their disciplinary orientation. Psychologists are likely to focus on subjective well being; sociologists are likely to focus on social indicators; consumer researchers are likely to focus on consumer well-being; management researchers are likely to focus on quality of work life. Increasing specialization in QOL research within the traditional academic disciplines serves to heighten a sense of community in QOL research, which in turn spills over into seeking membership in societies, associations, and networks of QOL researchers. The growth of these societies, associations, and networks should foster the educational mission of QOL research. In other words, the more these societies, associations, and networks become established, the greater the likelihood that these organizations would offer educational workshops and other educational opportunities to enhance the training of QOL researchers and potential QOL researchers. We are already witnessing such a trend in the International Society for QOL Studies and the International Society for QOL Research.

Furthermore, the growing job market is likely to create changes in terms of academic journals and professional associations. It is possible that there will be several QOL professional associations and many other associations that will focus on the various areas of specialization. For example, the International Society for QOL Research is now focused on health-related QOL research, the Sustainable Development Forum focuses on sustainable development issues, the Positive Psychology Network focuses on subjective well being, and so on. Eventually, these professional associations will have their own general and specialty academic journals. The International Society for QOL Research already has its own journal, namely the *Quality of Life Research*. There will be annual conferences related to QOL studies as well as many specialty conferences that focus on the various areas of specialization. For example, the International Society for QOL Studies has organized several conferences focusing on community quality of life indicators. The increasing proliferation of new societies specializing in specific areas of research in QOL serves to increase educational opportunities within those specialty areas. These specialized

societies are likely to offer workshops and other educational seminars to help train QOL researchers and potential QOL researchers within the target specialty areas.

*The service mission.* Academic and non-academic QOL researchers are likely to increasingly assist organizations (government, non-profit, and for-profit organizations) in developing and validating performance measures to help those organizations in organizational performance assessment. They are likely to help organizations design and implement organizational assessment studies – the greater the service of QOL researchers to organizations, the greater the heightened awareness of the importance of QOL research, which in turn increases the need for more service; the greater the need for such service, the greater the need for QOL researchers; thus, the greater the service, the greater the need for training in QOL research. The increasing need for educational opportunities is likely to be met by faculty offering training seminars and workshops related to organizational performance assessment in their own schools through management development seminars offered to professionals. Alternatively, training seminars and workshops are likely to be offered through those QOL-related societies, associations, and formal networks. *What Can QOL Researchers Do to Accelerate Growth*

QOL researchers committed to the QOL studies movement can help accelerate the growth of QOL studies and its diffusion and utilization in the job market. We believe that there are two sets of strategies that can be used to accelerate growth of the field. These initiatives can come from higher education, the private sector, professional associations, foundations, governments, and political institutions.

*University initiatives.* We identified several initiatives that academic QOL researchers can undertake to accelerate the growth of the science of QOL research. These initiatives include establishing university QOL research centers, developing QOL research graduate minor programs, developing a QOL research academic degree program, and developing QOL research academic courses.

*University research centers* play an important role, not only in conducting QOL research, but also by providing the seed for

curriculum development, the recruitment of a new cadre of QOL scientists, and training of these recruits. Therefore, we recommend that faculty within any academic department specialized in QOL studies should coalesce and propose to the department administration the development of a department-wide center of QOL studies with a specific focus reflecting that department. For example, one or more faculty in a management department conducting research on quality of work life can work together to develop a "Center for Quality-of-Work-Life Research." This center should in turn conduct sponsored research on quality of work life in order to assist organizations to develop and implement quality-of-work-life programs. Similarly, within a college a center can be developed cutting across departmental lines to bring together faculty to conduct QOL research reflecting the college's interests. For example within a college of business, QOL faculty from management, marketing, finance, accounting, and economics can coalesce to develop a college-wide center such as "The Center for Corporate Social Responsibility and QOL Research." Through this center a variety of business-related QOL research projects can be conducted. Business corporations would sponsor these projects. The same can be applied to university-wide centers. Faculty from a variety of academic departments cutting across two or more colleges can coalesce to form a university-wide center. For example, "Center for Health and QOL Research" may bring together faculty from many departments such as medicine, psychology, sociology, economics, health and recreation, leisure studies, marketing, management, healthcare administration, food and nutrition, gerontology, biotechnology, and statistics. Research centers are breeding grounds for new positions. Centers that are successful are those that attract research funding from sponsoring organizations. Successful centers are likely to have increased workload, which in turn translates into the need for more faculty positions within the center. Allocating faculty positions for these successful centers entail the recruitment of QOL researchers.

Because most QOL centers tend to be allied with some topic (e.g., Center for Quality-of-Work-Life Research) related to a discipline and/or academic department, school or college, one can easily develop academic programs through these centers and offer them as *minors* or areas of concentration to graduate students. For example,

a Center for Quality-of-Work-Life Research may be closely allied with the industrial/organizational psychology faculty in the Psychology Department and organizational behavior (or human resource management) faculty in the Management Department. Thus the center can offer a minor in Quality-of-Work-Life Research to graduate students in both psychology and management departments interested in this area of research. The minor can be composed of 3–4 academic courses such as a course on quality of work life, a course in subjective well being, and another course in the psychology of motivation.

Faculty within a university specialized in QOL studies can coalesce and propose to the university administration the development of *degree programs* by assembling existing course offerings. For example, an M.S. degree program in QOL Research can be developed by combining certain courses that have QOL content and general research methods and statistics. Examples of QOL-content-specific courses may include a course offered by the Psychology Department on subjective well being, a course offered by the Sociology Department on social indicators, a course offered by the Economics Department on sustainable development, a course offered by the Management Department on quality of work life, a course offered by the Department of Leisure Studies on leisure well being, and so on. General research methods and statistics courses should be part of any academic program. We suggest courses in research methods in the social and behavioral sciences and psychometrics (typically offered in a variety of departments such as psychology, sociology, and education) and statistics courses such as multivariate statistics, multiple regression, biomedical statistics, structural equation modeling, among others.

Faculty specialized in QOL studies can propose the creation of QOL-related *courses* within their own traditional disciplines and traditional academic departments. Many research universities encourage the development of graduate-level courses that are well aligned with faculty research interests. For example, a faculty in a management department interested in quality-of-work life research should develop a graduate-level course reflecting this area of research; a faculty in the psychology department interested in subjective well being research should develop a graduate-level in this area; those in a philosophy department interested in spiritual well being issues should

develop a course in that area; those in a marketing department interested in issues pertaining to consumer well being should develop a course in that subject matter; those in an economics department interested in economic well being should develop a course there too; and so on. Developing graduate-level courses are prerequisites to building a QOL academic program, and therefore a proliferation of QOL graduate-level courses within a university should be considered as a first step.

*Private-sector initiatives.* Private management consulting firms and think tanks (for-profit and nonprofit) work closely with government agencies and large corporations to conduct QOL research projects and training workshops. Examples of large think tanks include the Rand Corporation ([www.rand.org](http://www.rand.org)) and the Brookings Institute ([www.brookings.edu](http://www.brookings.edu)). Examples of small management consulting firms and think tanks include the Centre for the Study of Living Standards ([www.csls.ca](http://www.csls.ca)) and the Management Institute for QOL Studies (<http://civic.bev.net/miqols>). Management consulting firms can be specialized in providing specific services. Examples include the MAPI Institute ([www.mapi-research-inst.com](http://www.mapi-research-inst.com)). MAPI has a clearinghouse of many health-related QOL measures in a variety of languages and provides training in the use of these measures. The Social Weather Station ([www.sws.org.ph](http://www.sws.org.ph)) conducts regular QOL surveys in the Philippines to assist policy makers in decision-making.

There is much room for management consulting companies and think tanks to play a greater role in QOL research. Organizations need to conduct QOL research projects and professional training. The demand for QOL research and training in specialized areas (e.g., community QOL indicators, regional and urban QOL indicators, national QOL indicators, indicators to track children and youth well being, developing QOL outcome measures to assess the impact of newly developed pharmaceutical drugs) necessitates the supply of specialized services. Therefore, we encourage QOL researchers to join the ranks of QOL-related management consulting companies and think tanks. We also encourage the development of new firms that offer specialized services.

*Professional association initiatives.* As previously indicated, there are two main professional associations directly related to QOL research, namely, the International Society for Quality-of-Life Studies (<http://www.isqols.org>) and the International Society for Quality-of-Life Research ([www.isoqol.org](http://www.isoqol.org)). More recently, several other networks have been formed designed to bring QOL researchers together in certain areas of research. For example, there is now a network for positive psychology ([www.positivepsychology.org](http://www.positivepsychology.org)) that brings together mostly psychologists interested in subjective well being, happiness, and what they refer to as the “converse of abnormal psychology.” There is the International Sustainability Indicator Network ([www.sustainabilityindicators.org/index.html](http://www.sustainabilityindicators.org/index.html)) that brings together QOL researchers doing sustainable development indicators-type research. The Community Indicators Consortium (<http://www.communityindicators.net>) brings together several professional associations and networks that have a community-indicators focus.

What can these professional associations and networks do to further accelerate growth in QOL research? We suggest the following. Professional associations and networks can further promote QOL research by *sponsoring specific QOL research* projects on important issues of our time. To promote corporate social performance, the aforementioned professional associations and networks can sponsor projects such as the development and assessment of QOL programs in the workplace, the development of measures of consumer well being for particular industries (e.g., personal transportation, mobile communications, housing, and air travel), and developing specific measures of environmental well being directly linked to assessment of corporate environmental responsiveness.

Professional associations and networks can also promote QOL research by creating effective mechanisms to *publicize and disseminate QOL research findings* to the mass media. Publicity of QOL research findings to the mass media can serve to heighten awareness of the usefulness of QOL research in decision-making. Government officials are likely to recognize a greater need to base policy on good science rather than ideology. Business executives are likely to recognize that QOL research can be very useful in guiding in developing products and services that truly enrich consumers' lives. They are likely to

realize that implementing quality-of-work-life programs to enhance employee satisfaction can help reduce employee absenteeism and turnover. They may increasingly realize that QWL programs can increase employee moral and enhance job performance. Community planners are likely to realize that plans for community development have to be guided by good and solid QOL research. And so on. In other words, publicity of QOL research findings can heighten practitioners' awareness of QOL research. This heightened awareness serves the QOL research movement by increasing demand for more QOL researchers.

Professional associations and networks can further promote QOL research through *professional training*. Conferences, symposiums, seminars, and workshops should be organized at a higher rate with a special focus on areas of specialization. Therefore, in addition to the annual conferences that bring together QOL researchers with a diversity of interests, we recommend organizing more specialty conferences. A prototypic example is the Community QOL Indicators conference sponsored by the International Society for QOL Studies. This conference focuses on community indicators and brings together community planners and other executives of community organizations with academicians specializing in community QOL research. Furthermore, we recommend that these conferences and workshops be held regularly and consistently in different regions of the globe. Most conferences and workshops are held in North America and Europe. QOL researchers from other regions of the world can benefit significantly by either rotating these conferences throughout the different continents, organizing region-specific conferences and workshops, or both. Furthermore, QOL-related professional associations are advised to develop certified educational programs with certification. This can be done by creating educational institutes within their organizational structure and deliver training courses through the institute on a regular basis and in different parts of the world. To facilitate educational delivery, we recommend that these educational institutes adopt distance-learning methods.

Professional association can further promote QOL research by enhancing the publication efforts of the QOL scientists. We have journals such as *Social Indicators Research*, *Journal of Happiness Studies*, *Quality of Life Research*, *Indicators (The Journal of Social*

*Health*), and *Health and Quality-of-Life Outcomes*. There are sections of journals that are devoted to QOL (e.g., *Journal of Macromarketing*, the *Journal of Economic Psychology*), and other journals that are language-specific (e.g., *Social-Psychological Interventions* – this is a journal published in Spanish). To accelerate the rate of growth in publishing QOL research, professional associations may develop new journals focusing on QOL area of specialization. For example, there may be a need to develop a new journal in QOL research focusing on issues of recreation, leisure, travel, tourism, and hospitality. There may be another need that focuses on food, nutrition, fitness, and sports. There may be another that focuses on urban, rural, regional, and community development. Another journal may focus on business issues such as employee and customer well being. Professional associations can get into the business of publishing book series, reference and bibliographic materials, and encyclopedias. Electronic publishing is the wave of the future and professional associations that are QOL related should promote the creation of new electronic journals.

*Initiatives from global institutions.* There are many global institutions that conduct regular QOL research. The prototypic example is the United Nations Development Programme (UNDP). The UNDP ([www.undp.org](http://www.undp.org)) conducts QOL research and assembles this research in their *Human Development Reports*. Other global institutions do QOL research projects. Examples include the United Nations Environmental Programme ([www.unep.org](http://www.unep.org)), the World Bank ([www.worldbank.org](http://www.worldbank.org)), the International Monetary Fund ([www.imf.org](http://www.imf.org)), the Office of the High Commissioner for Human Rights ([www.unchr.ch](http://www.unchr.ch)), the International Labor Organization ([www.ilo.org](http://www.ilo.org)), the European Commission (<http://europa.eu.int/comm/>), and the United Nations Industrial Development Organization ([www.unido.org](http://www.unido.org)).

We encourage global institutions to set up QOL research programs in the same manner as the UNDP. Such programs serve to enhance the QOL research movement in significant ways.

*Foundation initiatives.* There is a great deal of work in QOL research supported by Foundations. One example is the KIDS COUNT project sponsored by the Annie E. Casey Foundation. This project

involves the development of children well-being measures, the collection of trend data of children well being in the U.S., and the implementation of various programs designed to enhance children well being in selected communities in the U.S. Such support from Foundations is indeed exemplary. We encourage foundations to use the Annie E. Casey's KIDS COUNT ([www.aecf.org/kidscount/](http://www.aecf.org/kidscount/)) as a guide for future projects.

Furthermore, we encourage foundations to work closely with professional associations to further the QOL movement. This can be done by having foundations establish award programs that can be administered by the various professional associations. These programs can be tailored to the needs of the foundations.

Foundations can also contribute to the QOL movement by subsidizing research tailored to their needs and providing seed money for the development of centers and/or programs of QOL Studies at universities and institutions of higher learning that have research faculty with QOL interests.

*Government initiatives.* Government can play a significant role in accelerating the growth of QOL research. This can be done through sponsorship of QOL research projects through government grants, developing in-house research departments that focus on QOL research, and working closely with professional associations to promote the science. In terms of sponsorship of QOL research, many of the government agencies that promote knowledge production in certain selected areas of research (e.g., National Science Foundation, the National Institute of Mental Health) can sponsor a variety of research projects that serve as pillars for QOL research and thus accelerate the growth of QOL research. Examples include:

- Developing prototypic theories, measures and methods of well-being indicators of specific vulnerable populations (e.g., elderly, children, adolescents, women, the poor),
- Developing prototypic theories, measures and methods of well-being of specific grouping units (e.g., individuals, families, communities, geographic regions, nations, trading blocks), and
- Developing prototypic theories, measures and methods of well being of specific life domains (e.g., health, education, family,

community, leisure, work, environment, spirituality, housing and neighborhood, transportation, friendships, marriage).

Within each ministry or department (e.g., education, transportation, health, environment, defense), there has to be performance measures to assess the effectiveness of their programs. QOL research can grow significantly if and when each agency develops an in-house department that develops QOL performance measures, collects data regularly, and uses the data to guide policy decision-making. An example of such an agency is the U.S. Department of Labor, which has its own Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)). But even for the government agencies that have their own in-house research departments, much of the research and data gathered by these government research organizations is dominated by traditional economists, not QOL researchers. Ideally, we would like to see an infusion of QOL researchers into these government research organizations. The vision is for each government agency to have its own performance measure based on QOL theory and research. Here are examples of ministries or government agencies in various domains having suitable QOL performance measures:

- Ministry of education should have student well-being measures,
- Ministry of transportation should have well being measures related to personal and public transportation,
- Ministry of health should have health-related well being measures,
- Ministry of labor should have work-quality-of-life measures,
- Ministry of social services should have family well-being measures,
- Ministry of commerce should have consumer well-being measures,
- Ministry of defense should have public safety well-being measures,
- Ministry of the environment should have environmental well-being measures,

Furthermore, within each province or state, government agencies should have their own in-house research organizations focusing on developing, collecting data, and disseminating the data to policy makers within their own geographic boundaries. Similarly, towns,

counties, and large municipalities should have similar research organizations.

### CONCLUSION

We made an attempt in this paper to provide an overview of the history of the QOL research. We did this from a variety of disciplinary perspectives: philosophy, sociology, economics, health and medicine, marketing, and management. We found that the history of QOL research has a rich past. We also described the current state of the art and science of QOL research from these different disciplinary perspectives paving way for future research to capture the momentum of the present. We gazed into the crystal ball and made an attempt to forecast where we are heading. We did this by analyzing the environmental forces shaping this field of study. The analysis led us to expect a bright and promising future. We offered many suggestions on how to accelerate the growth of this field of study and hope that those who can “pull the strings” to do so to further nurture and support our movement.

### NOTES

<sup>1</sup> Study prepared under an Emory University Heilburn Distinguished Emeritus Research Fellowship. This article is a reduced version of materials in a paper, entitled, “The Quality of Life Concept in Sociology,” in *The American Sociologist*, 35/3 (fall 2004).

<sup>2</sup> For a more extended historical overview, (see Engerman, 1997). A good brief survey is also contained in Donovan and Halpern (2002), Annex 2.

<sup>3</sup> Clewett and Olson (1974) mentioned in the preface section of their proceedings publication that another conference was scheduled to be held in June 1974 in Oxford, England. The conference organizers were named as Arthur Cullman of Ohio State University and Elizabeth Richards of WARNACO. The sponsor of that conference was named as the British Market Research Society. An attempt was made to locate the proceedings of that conference with no success. At this time, the author does not know whether such a conference actually took place and whether the proceedings of that conference were published.

<sup>4</sup> Kotler (1987) suggested three stages of evolution of the *marketing concept*. The *first* stage is the marketing concept. He argues the marketing concept had emerged as a result of movement from a product orientation to a sales orientation to a marketing orientation. The marketing concept focuses on consumer wants. Marketers adhering to the marketing concept make no judgments about

whether consumer wants are consistent or inconsistent with society's well being. The marketing concept has moved. The *second* stage of marketing evolution is the *humanistic marketing concept*. This concept of marketing posits that marketers consider both wants and consumer interests (needs not desires). Thus, humanistic marketers do not tell people what they should have. Instead, they market "better" goods and services and subsequently attempt to "educate" consumers about the benefits of the new and improved "products". The *third* stage of the evolution of the marketing concept is the *societal marketing concept*. This concept is designed to address the concerns of the humanistic marketing concept, i.e., some marketing practices may serve consumer wants and interests and yet hurt society's interests. This concept of marketing is likely to be adopted by many firms who realise the firm's best interests should be consistent with society's interests too.

<sup>5</sup> For a comprehensive but brief coverage of QOL studies in marketing, the reader may consult the *Handbook of Quality-of-Life Studies: An Ethical Marketing Perspective* authored by Sirgy (2001).

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