EXTENDING THE MATERIALIST/POST-MATERIALIST DISTINCTION.
Some remarks on the classification of values from a South African perspective[1]

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Abstract
Central to Inglehart's analysis and interpretation of the three waves of the World Values Survey data is the assumption that economic development, cultural change and political change go together in coherent patterns. In order to describe the value changes that he perceives to be taking place in different countries over time, he makes use of the distinction 'materialist/post-materialist' values, which was later amended to 'modern/post-modern' values. The questionnaire used for the World Value Surveys is structured accordingly. Research done in the context of the Values and Policy Programme at Stellenbosch raises questions regarding the adequacy of this distinction in the case of emerging economies. In order to cover the full spectrum of values, provision should also be made for 'pre-materialist' or 'pre-modern' values. These findings have recently been corroborated by a study based on 95WVS data and additional material and which specifically proposes an extension to the lower end of the materialist/post-materialist spectrum by adding a 'pre-materialist' band.

1. Introduction
The World Values Survey is in the process of being conducted for the fourth time. The previous surveys (in 1981-2, 1990-91 and 1995-97) have produced an impressive set of data, which formed the basis of several comparative studies – first and foremost by the leader of the project himself, Ron Inglehart of the University of Michigan. Central to Inglehart's analysis and interpretation of the WVS data is the assumption that economic development, cultural change and political change go together in coherent patterns (Inglehart 1998:5). He also hypothesises that economic and technological change can lead to coherent, and probabilistically predictable, patterns of cultural change (1998:6). At the same time, he concedes that the relationship between economic development and secularisation is complex. This brief analysis attempts to highlight some aspects of this complexity and what may even be described as the paradoxical nature of this relationship.

In order to assess change, Inglehart makes use of the important distinction between what he calls 'materialist' and 'post-materialist' values. As will be discussed below, this category was changed to 'post-modern' values after the 1990 survey, when it became clear that the shift in values entailed much more than economic change and that it included the political, cultural and personal dimensions. An important question is how applicable this distinction is in developing economies. Inglehart himself draws attention to the tension between the persistence of traditional values systems and the phenomenon of cultural change and shifts in value systems and comes to a paradoxical conclusion: available evidence supports both positions (1998:2). More examples of this kind are not difficult to

find in the WVS data. One of these is the effect of poverty/prosperity on value systems and the underlying assumption industrialisation, economic growth and an increase in disposable income will promote post-modern values. It is abundantly clear that changes (or non-changes) in value systems cannot be reduced to economic factors alone.

2. Doubts regarding the adequacy of the materialist/post-materialist continuum

Already at the Stockholm meeting of the WVS group in 1998, my colleague Johann Kinghorn and myself made a case for extending the materialist/post-materialist continuum when attempting to map South African values. This proposal was based on research undertaken in the context of the Stellenbosch Values and Policy Programme. Two reasons were given for this extension - the complexity and diversity of the South African population as far as values are concerned and the extent that poverty is affecting value orientations.

Although there are many parallels (and indeed an inter-relatedness) between the South African transition and other examples of democratisation in Eastern Europe, Latin America and South East Asia, there are also marked differences. These have to do with the history and specific circumstances of the South African experience.

The political changes in South Africa were accompanied by a sustained public discourse on the kind of society the new dispensation was supposed to create – a discourse which started long before the actual political transition took place. The Human Sciences Research Council's *Investigation into Intergroup Relations* (1981-85) is an early example, which provided important empirical data, but which did not examine the substance of values as such. This became the focus of work done at the *Centre for Contextual Hermeneutics* at Stellenbosch University and by the *Stellenbosch Economic Project,* which explored the values, systems and structures that are important for the consolidation of the fledgling democracy. The critical question informing this research was: What will be needed to support a shift to democracy in the long run? What kind of value system will sustain a stable democracy? This is very much in line with Inglehart's (1997:164) claim that 'once democratic institutions are in place, their long-term survival depends on the presence or absence of supportive orientations among the citizens. The growing importance of mass preferences is inherent in the very nature of democracy.'

Despite the apparent universal currency that values like 'justice', 'equality' and 'participation' have attained, the contextual expression of these values differ greatly and should make us wary of a too easy identification of surface values in different societies. 'The good life' or the 'quality of life' has quite different referents in different contexts. This necessitates the rethinking of values in a more fundamental way – not only re-examining and redefining basic concepts, but also finding suitable contextual articulations if these values are to be applied effectively. This type of value discourse requires supportive skills and specific training – the development of a hermeneutical ability and the necessary leadership capacity to deal with values in such an applied form. In our case, this led to the establishment of the 'Values and Policy Programme'. This is an interdisciplinary teaching and research programme offered jointly by the departments of Religion, Philosophy, Sociology, Political Science and Economics. The main aim is to instil the hermeneutical skills to interpret values and to develop the capacity of decision-makers to formulate effective, value-based policy.

The empirical investigation of values, of which the *World Values Survey* is a prime

aspects or on a certain country. The South African part of the WVS finds valuable comparative data in the regular longitudinal elite surveys conducted by the Centre for Comparative and International Politics at the University of Stellenbosch. Post-graduate students of the Values and Policy Programme conduct local surveys in the format of the WVS. These have proved to be of special significance in assessing the effectiveness and applicability of the WVS approach, as will be indicated below.

3. Modern, post-modern - and 'pre-modern' values?

The basic hypothesis explored by the World Values Survey is that shifts in value systems have important economic, political and social consequences. This hypothesis is of special significance for the process of democratisation – one of the dominant global trends of the last decade. If democratic theory suggests that free speech and mass participation, together with interpersonal trust and tolerance of minority groups are important for the consolidation and stability of democracy, empirical evidence becomes critical to prove or disprove these theoretical assumptions (Inglehart 1997:1). The WVS provides a unique database for this purpose.

Inglehart's schematic presentation of the democratisation process fits the South African chain of events remarkably well. The economic development of the country after the 1899-1902 war went through a modernisation phase that was already supported by a partial democracy. The first triggering event was the 1948 elections, bringing the National Party into power and signalling the formal beginning of the *apartheid* state. Although a formal democracy, it excluded the majority of the population from the democratic process, resulting in a political system that was neither fascism nor communism, but which exhibited many features of an absolutist state. The cognitive mobilisation and values change that followed in the next phase (within the broader shift to the post-modern phase and the rise of the knowledge sector) were in fact initiated by the freedom movement and more specifically the ANC. Their Freedom Charter already spelt out the alternative values system on which the opposition to the *apartheid* state was based. The triggering event was most probably the 1976 Soweto riots, resulting in high levels of mass participation. This led to the struggle to end the present regime and after 1990 to the participation in the first inclusive democratic elections in 1994 and the comprehensive transformation of the South African society. At the moment, the country finds itself in the volatile phase of stabilising the fragile democracy, hopefully leading to period of sustained growth and long term stability.

These dramatic changes took place when the world at large was moving into the post-modern phase and the knowledge society was beginning to spread. Was this move also characteristic of the changes within South Africa? It would seem that more than a move from modernist to post-modernist values was happening here. The situation is much more diverse. Alongside modern and post-modern values, there still seems to exist a pre-modern set of values in operation, which has to be taken into account. It is therefore necessary to return to the basic assumptions of Inglehart's model.

Central to Inglehart's interpretation of the results of the WVS is his hypothesis that the unprecedented degree of economic security experienced in by the post-war generation in most industrial societies resulted in a gradual shift from 'materialist' values (emphasising economic and physical security above all) toward 'post-materialist' values (emphasising self expression and the quality of life). After the second wave of the WVS in 1990, it was realised that the materialist or economic dimension represents just one aspect of a much

Inglehart adjusted his terminology by referring to the emergence of 'post-modern' values (1996:5). Research on the materialist/post-materialist shift was guided by two further hypotheses. Firstly, a scarcity hypothesis that states that an individual's priorities reflect his/her socio-economic environment. One places the greatest subjective value on those things that are in relative short supply. Secondly, a socialisation hypothesis that states that value priorities do not adjust immediately to the socio-economic environment. There is a substantial time lag, because one's basic values reflect to a large extent the conditions that prevailed during one's pre-adult years. Value changes can only be expected per generation. For this reason, Inglehart is especially interested in age differences. The conditions during one's formative years are decisive for value orientations. According to him, the basic human personality structure is already formed by the time an individual reaches adulthood and changes relatively little thereafter. The new birth cohorts that grew up in a context of economic security are the ones most likely to display post-materialist values. The WVS data would seem to substantiate birth cohort differences.

In order to trace the shift from materialist to post-materialist values, Inglehart has developed the so-called '4-item materialist/post-materialist' values battery. Respondents were asked to select what their country's two top goals should be from the following four possibilities:

(1) maintaining order; (2) giving people more say in government; (3) fighting rising prices; (4) protecting freedom of speech. Those who selected (1) and (3) were classified as 'materialists', those who selected (2) and (4) as post-materialists'. The four remaining combinations were classified as 'mixed'.

The 4-item battery was later augmented with a 12-item battery. Items with a materialist polarity are the following: 1) Fight rising prices 2) Strong defence forces 3) Economic growth 4) Maintain stable economy 5) Fight against crime 6) Maintain order. The items with a post-materialist polarity are 7) more say on job 8) Less impersonal society 9) Ideas count more than money 10) More say in government 11) Freedom of speech 12) More beautiful cities. Without exception, the first six and the last five clustered together, but on opposite poles. The last item fell neat on the midpoint.

Inglehart is quick to point out that there is no one-to-one relation between economic level and the prevalence of post-materialistic values. For him, these values reflect one's *subjective* sense of security, not one's economic level *per se*. The key factor in value change is not one's absolute income, but the degree of security experienced during one's formative years.

How applicable is the materialist/post-materialist dimension (that was originally developed to for use in analysing Western societies) to other societies? Does this work also in non-western and in poor societies? Prior to the 1990 WVS, the battery has not been tested in low-income societies and only in one ex-socialist society. Abramson and Inglehart (1995) have tested its relevance for non-western societies and are convinced that the materialist/post-materialist travels well cross-culturally. Feeling secure or insecure about survival is meaningful in most societies. There are few Post-materialists in low-income societies, so the dimension is less important and less strongly structured there, accounting for a smaller percentage of the variance than it does in advanced industrial societies. But these items seem to tap comparable concerns in poor countries and in rich countries.

As far as South Africa is concerned, it is only one of two countries among the 43 that shows a clear shift towards materialistic values in the period 1981-90. Inglehart explains this unexpected development in terms of the severe insecurity that South Africa experienced during this period. 'its economy, suffering from international boycott and low

commodity prices, experienced economic stagnation throughout the 1980's. Moreover, widespread violence and political instability gave rise to growing concern for physical security among both blacks and whites. Powerful period effects were working to produce a sense of insecurity, rather than the security that contributes to Postmaterialist values' (Inglehart 1966:18).

The results of the 1995 WVS confirm this shift in a remarkable way. The 'materialist battery' clearly shows a strong emphasis on the combat of crime, and a premium on stability, law and order and economic growth (see diagram 1). Additional data corroborates this trend and shows that poverty remains the chief concern.

But is this the full picture? Further research undertaken in the context of the Values and Policy Programme would seem to indicate that the standard set of questions used in the WVS is in need of re-examination on at least two counts. The first relates to the spectrum covered by the materialist/post-materialist distinction. Although this captures the 'upper end' of the spectrum well, preliminary results would indicate that (especially in rural areas) provision for a 'pre-modernist' dimension should be made if values and value shifts are to measured in a meaningful way in this context. The second relates to a value orientation that seemingly contradicts the materialist trend (cf. diagram 2). When respondents were asked to complete the following statement: 'I will be satisfied with my life if at the end I ...', the post-materialist options like 'helped people', 'have loving friends' and 'was creative and productive' clearly outscored materialist options like 'had fun and pleasure' or 'was healthy'. (There seems to be an affinity with the results of the Swedish Youth Survey). This apparently contradictory evidence should alert us to the fact that value shifts are multi-faceted and complex phenomena and in urgent need of further exploration.

4. The case for adding a 'pre-materialist' band

'The classic question in cross-national survey research is, 'Does a word or phrase have the same meaning in country A as in country B?' This problem is particularly acute in the present case, because we are not merely comparing responses form country A with those from country B, but are comparing 40 societies widely distributed around the globe and across an enormous spectrum of political and economic characteristics. Are responses of people interviewed in these widely settings actually comparable?' (Abramson and Inglehart 1995: 101).

The authors are confident that the results achieved by the 12-item values battery show conclusively that we are dealing with comparable data. These results are not based on a single item, but on a substantial set of related questions, which function as its own control mechanism.

But there are other factors that need to be considered. In the case of South Africa, the values discourse was informed by a wide spectrum of inputs. These include the negotiations preceding the transitional constitution, the discussion of the bill of human rights, the final constitution, a whole series of laws to give effect to transformation of almost all aspects of society, the campaign preceding the 1994 election, the proceedings of the Truth and Reconciliation Commission, and many more public hearings, consultations and investigations.

In the process, many post-materialist values became embedded in a context that certainly did not offer economic security, stability or future prospects to a younger generation. Post-materialist positions regarding freedom of speech, gender attitudes, participation, the re-humanisation of society became the accepted norms, at least, in official documentation.

A further complication was the redefinition of post-materialist concepts, giving it a content that was more materialist than post-materialist. For example, the much used phrase 'a better life

in the WVS. It has a decidedly materialist content: basic housing, running water, electricity – all elements of basic security and survival, certainly not of post-materialist priorities like emphasising self expression and the quality of life. In order to increase the usefulness of the WVS, these concepts and their content have to be defined much more clearly, taking the contextual situation into consideration in a more substantial way.

The tentative results of Values and Policy Programme that suggest that the materialist/post-materialist continuum is too narrow to capture the full spectrum of values prevalent in an emerging economy, have recently been confirmed by Taylor (1999). This study is based on secondary analysis of 1995 WVS data and on additional own research material.

Two aspects of Taylor's work are of specific importance for our present study. The first is that her research was undertaken five years after the first democratic election of 1994. Despite high expectations of social transformation and of economic growth that will promote the move towards post-materialist values, Taylor shows that the reality on the ground is still very different. Not only is a stark inequality along racial lines still prevalent, but the ongoing political and economic restructuring causes high levels of uncertainty. On top of this, more than half the population can be described as poor (cf. Diagram 3). The consequence of all these factors is that the materialist/post-materialist spectrum is just too narrow to capture the full picture.

The second point of importance is that Taylor actually did include a pre-materialist set of questions in her questionnaire alongside a materialist and post-materialist sets. The pre-materialist index comprised the following items: Providing shelter for all people; providing clean water for all people; making sure that everyone is adequately clothed; making sure that everyone can go to school; providing land for all people and providing everyone with enough food to eat (cf. Diagram 4).

The principal components analysis of Taylor to assess the statistical relatedness of all 18 value items is an attempt to replicate Inglehart's analysis of the materialist/post-materialist divide. The theoretical assumption is that the items cluster together in a statistical significant way. The subsequent empirical results of Taylor's survey fully vindicate her inclusion of a pre-materialist index (cf. Diagrams 5-8). The different value priorities expressed by black and white respondents also confirm the racial divide (cf. Diagrams 9-10).

5. Conclusion

The study of Taylor and the Values and Policy research shed interesting light on a number of issues, including the value orientation of the different political parties in South Africa. The conclusion is that the world-wide trend towards post-materialism is not (yet) evident in South Africa when the pre-materialist items are included. South Africans exhibit a map of predominantly mixed value types at this stage, with the emphasis on pre-materialist and materialist values. But there are also other signs. Some post-modern values also appear, even in a poverty environment. Although there is a racial divide on the one hand, there are signs of value overlap on the other hand. The almost identical position of the old and new middle class is a case in point. What must be remembered is that the 95 data reflect a situation where the transition has barely begun. The 2000 survey would be of great value to assess whether any progress is being made in consolidating democracy.

There are several important implications for the proposed next wave of the WVS. Countries where poverty is still a dominant feature might find it valuable to include a pre-materialist section in their national surveys. Some refinement of this section itself is needed, for example a question of health, a urban/rural variable and a union membership

the different value surveys, but also the need to update basic concepts originating from a particular understanding of social reality in the light of newer developments (e.g. the emphasis on the role of knowledge and knowledge production).

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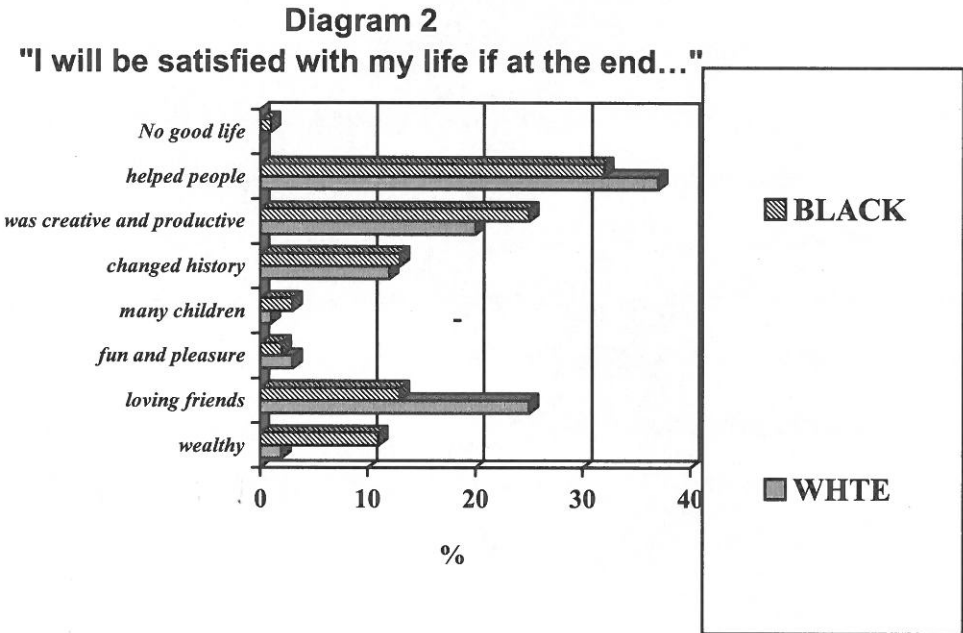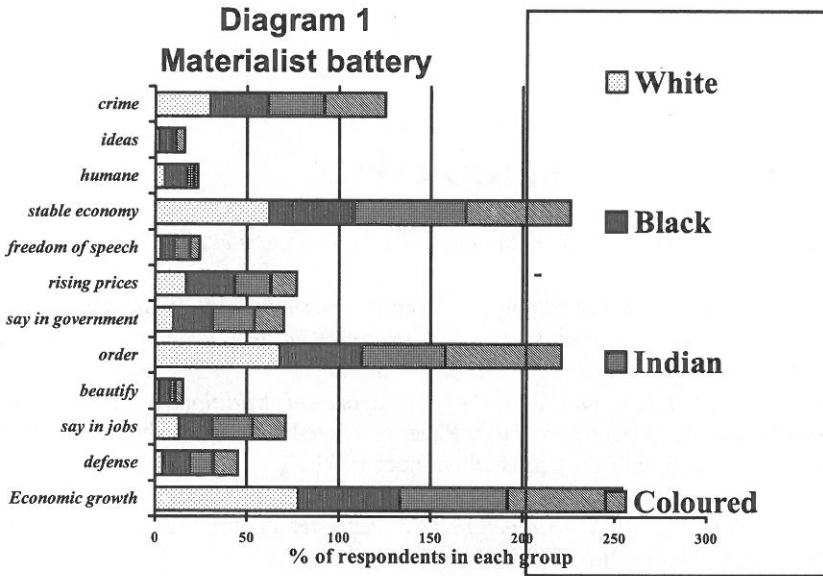Taylor,. H 1999. *Squaring the circle.* Unpublished MA thesis. University of Stellenbosch.

Diagram 1
Materialist battery

crime

ideas

humane

stable economy

freedom of speech

rising prices

say in government

order

beautify

say in jobs

defense

Economic growth

☒ White

▣ Black

▣ Indian

Coloured

% of respondents in each group

Diagram 2
"I will be satisfied with my life if at the end..."

No good life

helped people

was creative and productive

changed history

many children

fun and pleasure

loving friends

wealthy

▨ BLACK

▧ WHTE

%

Diagram 3
Inequality in SA: Select Social Indicators

	Black	Col	Ind	White	RSA
Infant mortality rate	54.3	36.3	9.9	7.3	48.9
Human development index	0.500	0.663	0.836	0.901	0.677
Gini Coefficient	0.53	0.44	0.47	0.45	0.58
Mean annual household income – urban	17900	22600	40900	59800	
Poverty rate	60.7	38.2	5.4	1.0	
Unemployment rate	41	23	17	6	33

Access to services:

Piped water in dwelling	33	72	97	97	51
Electricity for lighting from public supply	51	84	99	99	65
Telephone in dwelling	14	38	74	85	32

Diagram 4
Indicators of Pre-materialist, Materialist & Post-materialist Values

Pre-materialistic Values	Materialistic Values	Post-materialistic Values
Providing shelter for all people	Fighting rising prices	Protecting freedom of speech
Providing clean water for all people	Maintaining law & order	Giving people more say over government
Making sure that everyone is adequately clothed	Maintaining high rate of economic growth	Keeping cities & countryside beautiful
Making sure that everyone can go to school	Maintaining a strong defence force	Giving people more say in their work & in their community
Providing land for all people	Fighting crime	Creating a society where ideas count more than words

Diagram 5
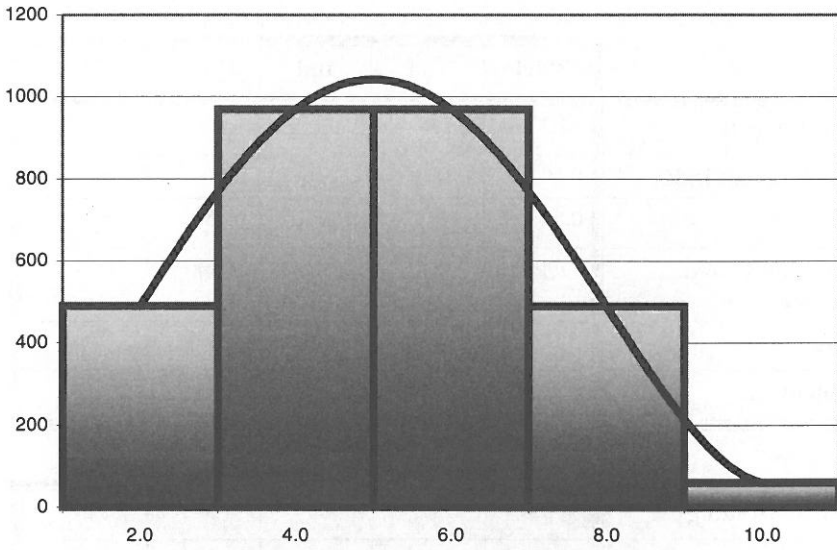
Pre-materialistic Index

Diagram 6
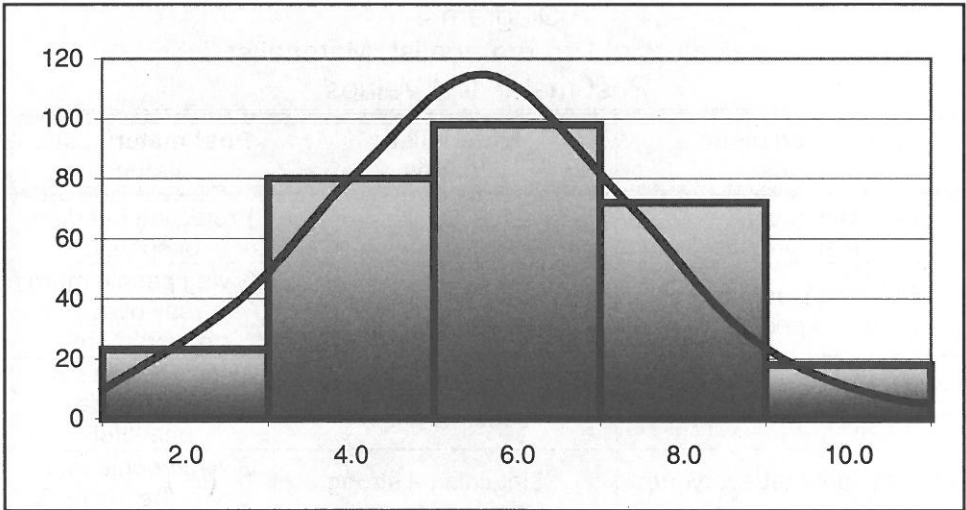
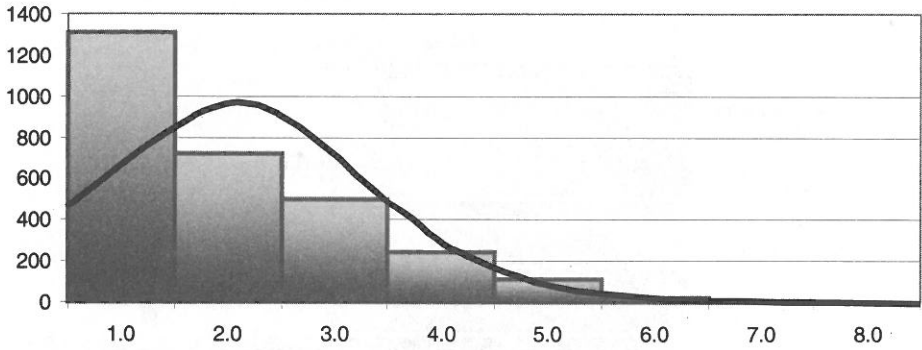Materialistic Index

Diagram 7
Post-materialist Index

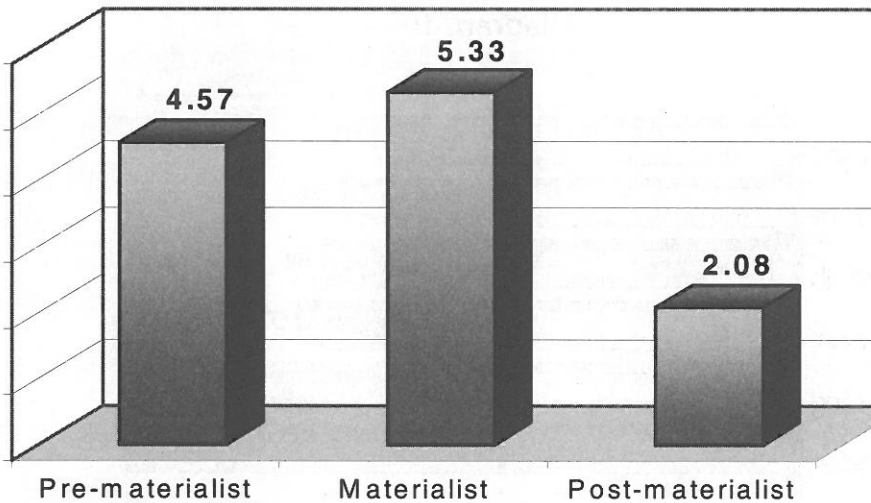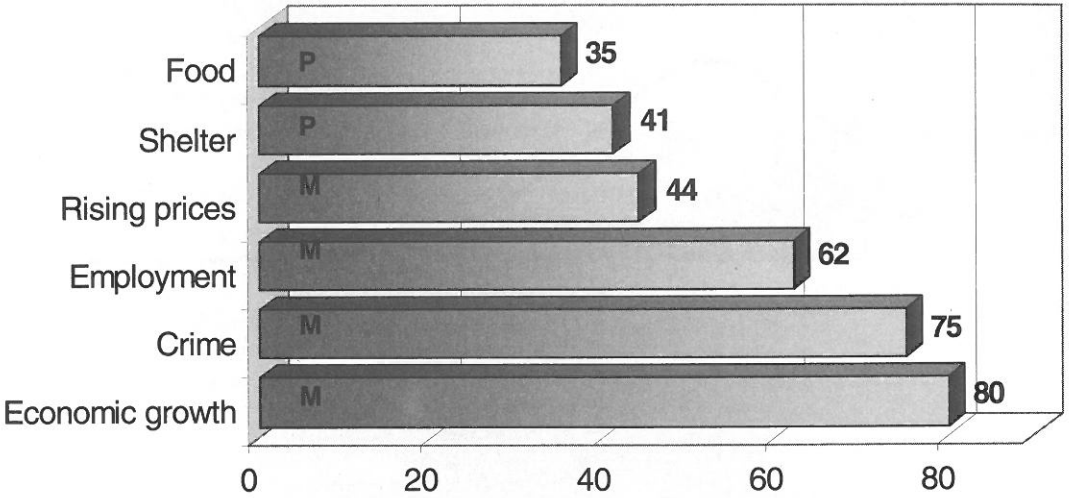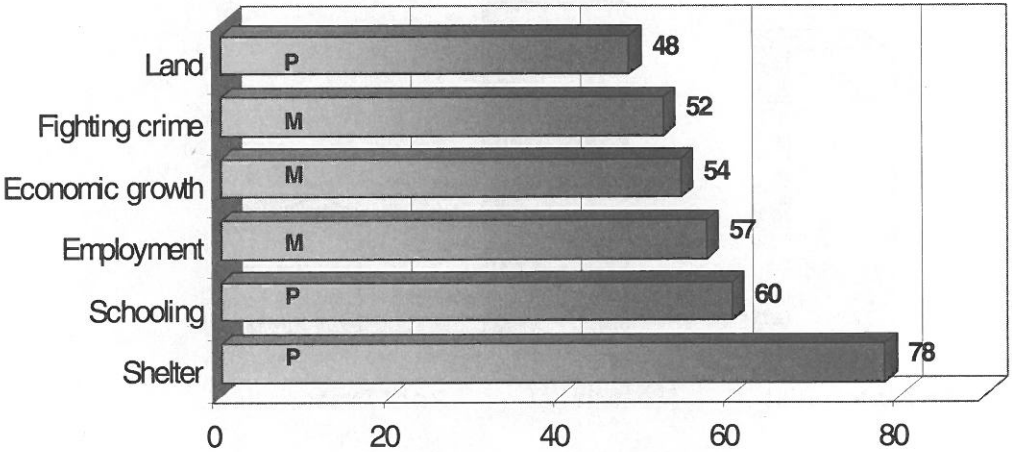# Diagram 8
Mean Scores on Values Indexes

Diagram 9

Top Six Value Priorities: White

Diagram 10

Top Six Value Priorities: Black