

ROKEACH VALUE SURVEY (RVS)

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1. Core Definition and Purpose

The Rokeach Value Survey (RVS) is a highly influential psychological instrument designed to evaluate an individual's comprehensive system of fundamental beliefs and priorities, collectively known as personal values. Developed by psychologist Milton Rokeach, the RVS serves as a tool to enable subjects to identify and rank what is of utmost significance in their lives, thereby facilitating sound individual and ethical decisions. Rokeach posited that values are deeply ingrained, established mindsets that dictate that a particular manner of behavior or a final state of being is individually or socially more suitable and preferable than an opposing or converse mode of conduct or terminal state. This formal definition underscores the RVS's utility not merely in measurement but in understanding the motivational underpinnings of human action across various domains, including moral judgment, political orientation, and consumer choice. Unlike general personality assessments, the RVS focuses specifically on the hierarchical organization of an individual's belief system, providing a structured framework for self-reflection and analytical study of personal ethics.

The central purpose of the RVS is to provide a quantitative assessment of an individual's value hierarchy, which Rokeach viewed as the fundamental driver of attitudes and behaviors. By forcing subjects to rank values rather than merely rate them, the RVS captures the relative importance of these beliefs, recognizing that individuals typically hold a finite number of highly important values. This forced-choice ranking methodology distinguishes it from many other value inventories that rely on Likert scales. The resulting hierarchy offers a snapshot of the psychological structure that guides an individual's life choices, career planning--where the RVS has been particularly popular as an occupational planning tool--and interactions within social and organizational contexts. Furthermore, the RVS framework allows researchers to compare value systems across different demographic groups, cultures, and time periods, lending itself well to both micro-level psychological research and macro-level sociological analysis concerning societal shifts in moral and personal priorities.

2. Historical Development and Proponent (Milton Rokeach)

The Rokeach Value Survey originated from the pioneering work of Milton Rokeach during the 1960s, building upon earlier conceptualizations of values in sociology and anthropology. Rokeach recognized a significant gap in psychological measurement: while numerous instruments existed to measure specific attitudes or personality traits, few comprehensively addressed the core, enduring beliefs that underpin these superficial manifestations. His work was heavily influenced by the concept of value systems as developed in sociology, particularly the idea that values are organized

into systems rather than existing as isolated entities. Rokeach sought to create a psychometrically sound, standardized inventory that could capture the complexity and structure of these systems, ensuring that the defined values were universal enough to be relevant across diverse populations while remaining distinct enough to allow for meaningful differentiation and ranking.

Rokeach developed the RVS as a direct response to the need for a reliable measure capable of predicting behavior more accurately than simple attitude scales. He meticulously selected 36 values--18 terminal and 18 instrumental--based on extensive preliminary research to ensure they covered the full spectrum of human motivational concerns. The standardization of these 36 values provided a stable basis for comparison, allowing researchers to move beyond anecdotal descriptions of personal priorities to quantifiable data sets. The first major publication detailing the RVS and its theoretical foundation appeared in Rokeach's seminal 1973 work, The Nature of Human Values. This publication established the RVS as a cornerstone measurement tool in social psychology, particularly in studies related to morality, ideology, and organizational culture. His commitment to linking abstract values to observable behavior cemented the RVS's longevity and utility in academic and applied settings.

3. Theoretical Framework of Values

Rokeach's theoretical framework hinges on the assertion that values are enduring prescriptive beliefs concerning desirable end states (terminal values) or desirable modes of conduct (instrumental values). He distinguished values from attitudes, noting that a value transcends specific situations, whereas an attitude is focused on a specific object or situation. For example, the value of **Honesty** is relevant across all interpersonal situations, while an attitude toward a specific political policy is situation-bound. Furthermore, Rokeach maintained that every individual possesses a total system of values, organized hierarchically by importance. It is this hierarchy, or value system, that dictates choices when multiple values are potentially relevant to a decision or action.

The framework emphasizes that values serve two primary functions: prescriptive and adjustive. Prescriptively, values guide behavior by informing individuals about what ought to be pursued or achieved. Adjustively, they help individuals rationalize past actions and make sense of the world, often serving as defense mechanisms or justifications for personal or social choices. The constant interplay between the two types of values--instrumental and terminal--is central to the RVS model. Instrumental values are the means employed to achieve terminal values, meaning that the desire for a specific end-state (terminal value) often necessitates the adoption of corresponding behavioral attributes (instrumental values). Understanding this dynamic relationship allows researchers to map out complex motivational structures, such as identifying whether an individual prioritizes competence (instrumental value) primarily to achieve a sense of accomplishment (terminal value) or merely for external recognition.

4. Components of the RVS: Terminal Values

The RVS is structurally divided into two distinct but interconnected sets of values. The first set comprises 18 **Terminal Values**, which represent desired end-states of existence or ideal manners of surviving that are generally glorified. These are the goals individuals seek to achieve over the course of their lives. When a subject completes the RVS, they are presented with a list of these 18 values and asked to rank them in order of importance to them personally, reflecting their ideal ultimate outcomes.

The 18 Terminal Values fall into two subcategories: personal and social. Personal terminal values relate to self-centered goals, such as inner harmony, an exciting life, and self-respect, reflecting intrinsic psychological needs. Social terminal values, conversely, focus on interpersonal or societal outcomes, such as world peace, equality, and national security, reflecting extrinsic concerns about the broader environment. Examples of key terminal values measured by the RVS include **A Comfortable Life** (a prosperous life), **Freedom** (independence, free choice), **Happiness** (contentedness), and **Wisdom** (a mature understanding of life). The forced ranking of these 18 items forces the subject to confront their deepest priorities, highlighting which ultimate goals are valued most and which are considered relatively less critical, providing a clear map of their aspirations.

5. Components of the RVS: Instrumental Values

The second set of values measured by the RVS consists of 18 **Instrumental Values**, which are desirable modes of conduct or behavioral attributes considered socially appealing and personally effective. These values describe the preferred means of behaving in order to achieve the desired end-states defined by the terminal values. While terminal values describe the goals, instrumental values describe the necessary character traits and actions required to reach those goals.

Similar to terminal values, instrumental values are grouped into two main categories: moral and competence values. **Moral values** focus on interpersonal and ethical conduct, concerning those aspects of behavior that have immediate consequences for others, such as being honest, forgiving, and responsible. These values often evoke feelings of guilt when violated. **Competence values**, on the other hand, focus on self-actualization and personal capabilities, describing desirable attributes related to achievement and efficacy, such as being ambitious, capable, and intellectual. Examples of pivotal instrumental values include **Ambitious** (hardworking, aspiring), **Clean** (neat, tidy), **Courageous** (standing up for your beliefs), and **Loving** (affectionate, tender). The ranking of instrumental values reveals the subject's preferred behavioral style and ethical framework, offering critical insights into how they navigate social challenges and professional environments, acting as the fundamental rules of engagement they employ in daily life.

6. Administration and Scoring Methodology

The standard administration of the Rokeach Value Survey involves presenting the subject with two separate lists of 18 values each--one list for terminal values and one for instrumental values--printed on adhesive labels or cards. The subject is then instructed to rank the values within each set independently according to their personal importance, assigning a "1" to the most important value, a "2" to the second most important, and so forth, down to "18" for the least important value. This forced-ranking method is fundamental to the RVS, as it prevents the respondent from assigning high importance to all values, thereby forcing the establishment of a genuine psychological hierarchy and capturing the relative trade-offs individuals must implicitly make when prioritizing their beliefs.

Scoring the RVS data primarily involves analyzing the mean rank assigned to each of the 36 values across a sample population, or analyzing the specific rank order for an individual. Researchers often employ non-parametric statistical methods, such as Spearman's rank correlation coefficient, to compare the value systems of different groups or to track changes in value systems over time. The output of the RVS is not a single score, but rather two distinct hierarchical profiles: the Terminal Value System and the Instrumental Value System. This output can then be used to segment populations, predict differences in attitude (e.g., political liberalism vs. conservatism, where certain terminal values like **Equality** often rank higher for liberals), or analyze occupational fit, based on the assumption that individuals gravitate toward careers that allow them to fulfill their highest-ranked values. The simplicity and straightforwardness of the ranking procedure, despite the cognitive load it places on the respondent, have contributed significantly to its widespread practical application.

7. Applications in Research and Practice

The RVS has been widely adopted across diverse fields, demonstrating its utility in explaining and predicting behavior where motivational factors rooted in fundamental beliefs are key variables. In organizational behavior and human resource management, the RVS is frequently used to measure the alignment between an individual's personal values and the perceived values of the organization, a concept known as person-organization fit. High congruence between individual and organizational values has been consistently linked to higher job satisfaction, reduced turnover, and improved organizational commitment. Furthermore, the RVS aids in leadership development by helping managers understand their own decision-making biases and motivational drivers, thereby enabling them to lead more authentically and ethically.

In social and consumer psychology, the RVS has proved invaluable for cross-cultural research and market segmentation. Researchers have used the RVS to compare the fundamental values prioritized by different nationalities or ethnic groups, revealing how cultural norms shape

motivational structures--for instance, noting significant differences in the ranking of individualistic values (e.g., **Self-Respect**) versus collectivistic values (e.g., **National Security**) across Eastern and Western cultures. For marketing professionals, understanding the value profiles of target demographics allows for the creation of advertising campaigns that appeal directly to consumers' deep-seated terminal goals, leading to more emotionally resonant and persuasive communication strategies. The RVS provides a robust, quantitative tool for mapping these profound psychological landscapes.

8. Reliability, Validity, and Psychometric Properties

Psychometric evaluations of the RVS generally indicate adequate, though sometimes variable, reliability and validity, particularly when compared to newer, theoretically refined value inventories. Test-retest reliability studies, which measure the consistency of rankings over time, typically show moderate to high stability for the overall value system, especially for the top-ranked values. This stability supports Rokeach's assertion that values are relatively enduring beliefs, rather than transient attitudes. However, the stability of specific individual rankings can sometimes be lower, particularly for values ranked in the middle of the list, where respondents often struggle with minute differentiation.

Regarding validity, the RVS has demonstrated strong construct and predictive validity across numerous studies. Construct validity is supported by consistent factor analyses that typically confirm the theoretical distinction between the two sets of values (terminal vs. instrumental) and the underlying moral/competence and social/personal subcategories. Predictive validity is evidenced by the RVS's ability to correlate significantly with diverse behavioral outcomes, such as political affiliation, career choice, ethical decision-making, and charitable giving. Despite these strengths, some researchers have noted that the 18-item ranking task can introduce methodological noise, as the ranking process itself may artificially inflate the internal consistency measures (ipsative nature), leading to challenges in interpreting absolute importance scores compared to normative measures.

9. Criticisms and Subsequent Modifications

Despite its enduring influence, the RVS faces several methodological and conceptual criticisms. The most significant critique pertains to the **ipsative nature** of the ranking data. Because subjects are forced to rank the values, the scores are interdependent--a high rank for one value necessitates a low rank for another. This structure makes standard statistical comparisons between individuals difficult, as it is impossible for two people to simultaneously rate all the same values as highly important, regardless of their true beliefs. Furthermore, the forced ranking can lead to **ranking fatigue** or cognitive overload, particularly for the 18-item lists, which may compromise the accuracy of ranks assigned to middle or lower-priority items.

A second major criticism relates to the potential for **social desirability bias**. Since the RVS uses explicit labels (e.g., 'Loving,' 'Honest'), respondents may consciously or unconsciously rank values that they perceive as socially acceptable higher than values they truly prioritize but feel uncomfortable admitting (e.g., 'A Comfortable Life'). Conceptually, critics also argue that the RVS list, fixed at 36 items, may not fully capture the full complexity or range of values relevant in modern society or in highly specific cultural contexts. These criticisms spurred the development of alternative value inventories, most notably the Schwartz Theory of Basic Values (SVS), developed by Shalom Schwartz, which uses a rating scale (non-ipsative) and a circular structure to define ten universal value types, offering a psychometrically distinct and theoretically refined alternative to the RVS framework.

Further Reading

Milton Rokeach (Wikipedia)

Rokeach, M. (1973). The Nature of Human Values. Free Press.

Schwartz Theory of Basic Values (Wikipedia)