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Te Tari Tatau

Review of the Measurement of Ethnicity

Classification and Issues

Main Paper

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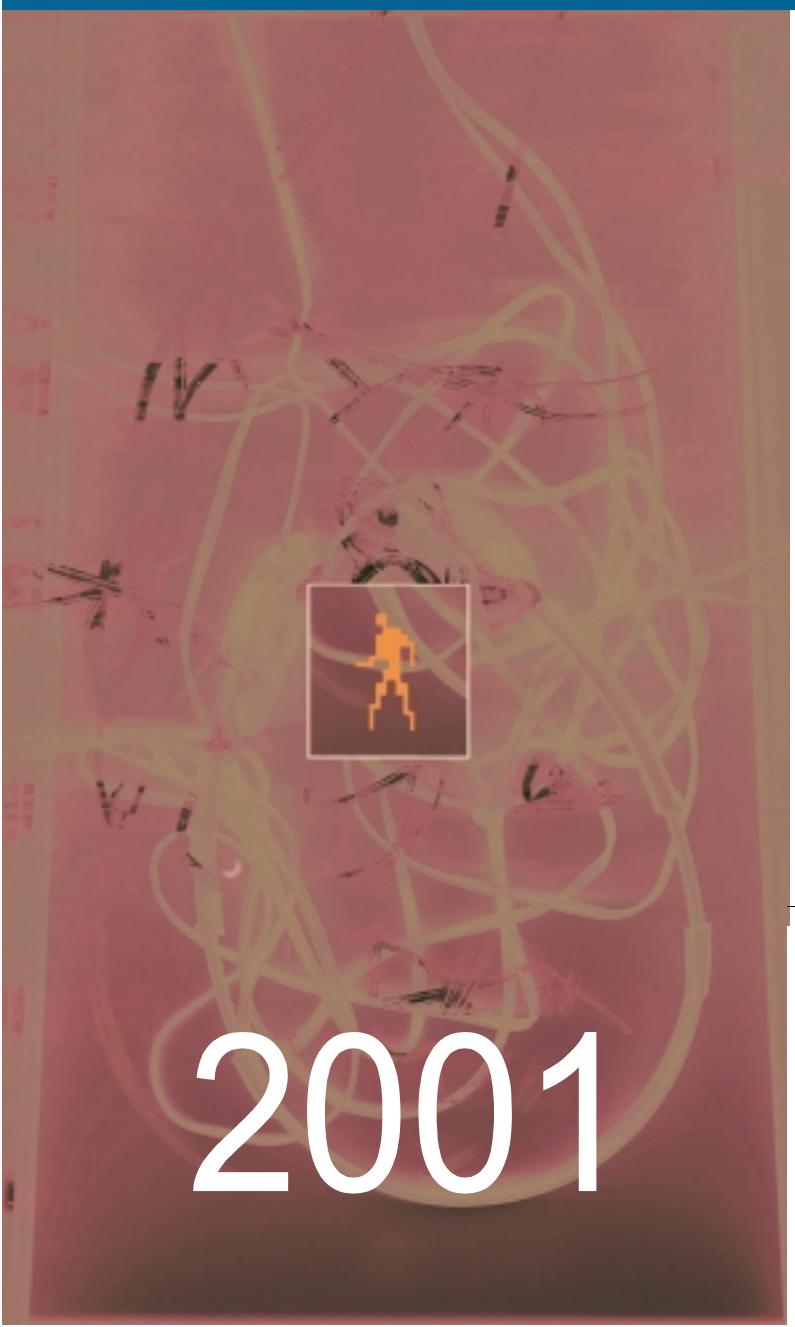

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Introduction

A series of papers regarding the 2001 Review of the Measurement of Ethnicity (RME) have been made available. This paper is a discussion document that raises some of the classification issues that need to be addressed in the review. The purpose of this paper is to stimulate debate with stakeholders rather than providing solutions. During the consultation phase of the RME, a set of questions will be given to stakeholders to facilitate feedback on issues raised in this and other RME papers.

Executive summary

Ethnicity is recognised as an important measure of differences between groups of people. Statistics New Zealand is bound by the Statistics Act 1975 to ask a question on ethnic origin in the Census of Population and Dwellings. The definition of ethnicity used by Statistics New Zealand is that ethnicity is self-perceived and people can belong to more than one ethnic group.

Responses to ethnic group questions are influenced by people's understanding of the term ethnicity, and by factors such as their ancestry, nationality, culture and religion. People's reported ethnic group(s) can change over their lifetime, either because of a change in perception or change in understanding of the mode of collection or a change in the forms used. The context in which the ethnicity question is asked, and questionnaire response categories, influence people's responses. With these issues in mind, ethnicity is not considered to be as robust a variable as some others.

There are problems with some terms used for categories within the classification. There is a lack of agreement of what term best describes the largest ethnic group in New Zealand. For example, some people prefer 'Pākehā' and others prefer 'New Zealand European'. Across all ethnic groups, an increasing number of people answering an ethnicity question refer to themselves as 'New Zealanders' or 'Kiwis'. While everyone can identify with New Zealand during collection by writing in this response, at output only the categories for Māori, and New Zealand European are identified with New Zealand.

The structure and content of the ethnicity classification has evolved to include a mixture of conceptually defined ethnic groups and commonly reported responses, causing inconsistencies in the way groups are named and classified. Changes in the New Zealand population through immigration, have resulted in the classification not clearly distinguishing some ethnic groups. There is the problem of identifying groups classified in large 'other' categories, as well as problems with mutual exclusivity within some categories. There are also considerations and constraints when producing a revised classification because categories need to be robust, exhaustive, mutually exclusive and consistent with the concepts being measured.

There are problems associated with how ethnicity data are output. 'Total response' output counts all those who indicate they belong to an ethnic group; therefore overall percentages are greater than 100 percent. 'Sole/combination' output allocates everyone to a single category of sole or multiple ethnic groups. When the priority recording system is used, each person falls into just one group. By prioritising the data at output some groups lose members, and it causes some bias in reported data. Prioritisation is contrary to the self-perceived definition of ethnicity and to multiple group identification. Although not a standard output, household and family ethnicity has often been requested, but defining it to give meaningful and useful data is difficult.

Producers and users of ethnicity data require a measure that is not only relevant to their needs, but will endure to produce consistent time series data. With any revision, the differing data collection methods (interview, self-administered) need to be taken into account, as well as questions used and classification coding procedures. Also, there needs to be a commitment by collectors and users of ethnicity data to implement a revised standard and classification. The ability to meet the various needs of producers and users places constraints on any revision to the measurement of ethnicity.

A. Introduction

A. What is ethnicity?

A.1 Statistics New Zealand's definition

The definition of ethnicity used by Statistics New Zealand is as follows:

'Ethnicity is the ethnic group or groups that people identify with or feel they belong to.' Using this definition, ethnicity is seen as self-perceived and people can belong to more than one ethnic group.

An ethnic group is defined as a social group whose members have the following characteristics:

- share a sense of common origins
- claim a common and distinctive history and destiny
- possess one or more dimensions of collective cultural individuality
- feel a sense of unique collective solidarity (Smith, 1981).

In practice, ethnicity is defined as the ethnic group or groups reported by respondents to the ethnic group question in the Census of Population and Dwellings and other Statistics New Zealand surveys. The responses given are one of the constraints in producing a standard classification.

A.2 The concept of ethnicity

There is little agreement on the meaning or concept of ethnicity. One commonly-held theory is the primordialist view that asserts that ethnicity is biological or unchanging. Another theory is held by the instrumentalists, who see it as a tool used by political powers to exploit others for their own interests. The fluidity of ethnicity is stressed in constructivist theory, where social and historical backgrounds are seen as important factors in defining ethnicity. (Barnard and Spencer, 1996)

To understand how ethnicity is perceived, Seymour-Smith (1986) explains the concept of ethnicity as having a we/they intent, that is the identification and labelling of a group occurs in relation to the other group(s).

A.3 Factors influencing ethnicity

Factors that may contribute to or influence a person's ethnicity, and that are often interrelated, include:

- **ancestry:** ancestors are described as people from whom a person is descended; a forefather; a person regarded as the forerunner of another (Chambers, 1991).

- **culture:** broadly speaking, a person's way of life, which may include music, literature, dance, sport, cuisine, style of clothing, values and beliefs, patterns of work, marriage customs, family life, religious ceremonies, celebration days/events which have particular cultural significance, eg Chinese New Year (Giddens, 1997).

- **where a person lives and the social context:** are they rural, village dwellers, landowners or city inhabitants?

- **race:** defined as 'the descendants of a common ancestor especially those who inherit a common set of characteristics; such a set of descendants, narrower than a species; a breed; ancestry; lineage, stock; a class or group, defined otherwise than by descent' (Chambers, 1991). This often 'refers to physical characteristics such as skin colour, treated by members of a community as ethnically significant. ... There are no clear-cut characteristics by means of which human beings can be allocated to different races' (Giddens, 1997).

- **country of birth** and **nationality:** nationality can be defined as membership of, or the fact or state of belonging to, a particular nation; a group or set having the character of a nation (Chambers, 1991).

- **citizenship:** the status of being a citizen and the membership of a community, or having the rights and duties of a citizen (Chambers, 1991).

- **religion** and **language:** religion can be a key element of an ethnic group, for example Jews. Language is also commonly a marker of an ethnic group.

It is important to note that while factors such as ancestry and country of birth can be important influences on a person's ethnicity, they do not necessarily determine a person's ethnicity. For example, people who have Irish ancestry do not necessarily identify themselves as being Irish ethnically. People who were born in Holland and immigrated to New Zealand may regard themselves as belonging to the New Zealand European/Pākehā ethnic group. It is not possible to completely divorce the concept of ethnicity, or the terms used to describe some ethnic groups, from nationality or geographical terms.

As stated in the definition, ethnicity is self-perceived, and people can belong to more than one ethnic group. People may change their ethnic group during the course of their life. Over time, it is also possible for new ethnic groups to emerge, for example as a result of large-scale immigration. The term used to describe an ethnic group can also change over time. A guiding principle in the collection of ethnic data is that we should try to use the terms that the people belonging to those ethnic groups would themselves use.

A.4 Factors influencing responses to ethnicity questions

The Macmillan Dictionary of Anthropology (1986) states that 'boundaries established by both labelling and contrast do not prohibit individuals from moving back and forth between respective groupings or categories' (p 95). People may report their ethnic group(s) differently as they age and their social networks change, or their time of stay in New Zealand lengthens. Changes in political climate may encourage or discourage identification with particular ethnic groups. An individual changing ethnic groups from one census or survey to another is referred to as ethnic mobility. This may be partly caused by changes in the question, or a different understanding of the question, rather than actual changes in the ethnic groups to which people belong.

Influences on response include the context in which the question is asked, who is with the person at the time of answering, the question, the order of responses categories, as well as what response categories are supplied. If the person is with family they may respond one way and when at work they may respond differently. These factors are especially important for those who do not speak English as their first language. People with English as a second language may have learnt the nationality-type term, rather

than their ethnic group. Also, they may be uncertain whether people will understand their specific ethnic group, probably influenced by the broad tick box categories on the form. Such people are then likely to give the general nationality-type term when answering a questionnaire. An example is Bosnians who are very certain that this is their ethnicity but instead answer 'Yugoslav'.

Geographical context may influence response. People may tend to give more general responses when they are far from the country or place(s) where their ethnic group originates. For example, there may be a tendency for people to report their ethnicity as, say, 'African' when they are answering a questionnaire in New Zealand, but as 'Igbo' when they are answering a questionnaire in Nigeria.
People may only identify themselves ethnically in broad terms as belonging to a particular group. Identifying with a particular group may be a sensitive issue or may be undesirable, for example, during times of war or tension between different groups. These people may want to report in a way that they see as less divisive.

Also, the individual concerned may not or cannot always fill in the form. Hospital attendants, funeral directors or relatives may enter information incorrectly for the person.

A.5 Why measure ethnicity rather than race or ancestry?

In the early years of New Zealand's colonisation by Europeans, there was a close connection between ancestry and race. Over time, the connection has diminished and race has limited value in distinguishing different groups of people in New Zealand. The 1988 review of the measurement of ethnicity concluded that the relatively high rate of intermarriage and degree of interaction between population groups in New Zealand had weakened the relevance of concepts of race-based concepts of ethnicity. Pool (1991) notes that New Zealand has a long history of high rates of intermarriage, so many people will have difficulty reporting their 'fractions of blood', and may in fact be unable to do so. According to Pool, self-perception has been the basis for replies to questions of ethnicity in the census since the first modern census in 1926. People reported their fractions of blood more in terms of their cultural identification than their racial composition.

Since a person's ancestry or race is biological, this measure may not indicate anything about the cultural or social groups the person belongs to, nor about their way of life or beliefs. For these reasons ethnicity is used rather than race or ancestry.

A.6 Why ask an ethnicity question?

The purpose of asking a question about ethnicity is to enable groups of people to be defined and measured for public policy purposes. Collection of this data allows analysis of economic, social and cultural characteristics of particular ethnic groups within the New Zealand population. On the macro level, ethnicity grouping allows analysis of the population in the fields of education, employment, health status, morbidity and mortality, and many other variables. Differences found between ethnic groups have an impact on both policy and the placement of resources.

The need for data on ethnic groups has been reflected in legislation. The 1975 Statistics Act specifies that a question on 'ethnic origin' should be asked by the Census of Population and Dwellings. However, as ethnic origin places the emphasis on ancestry, which people may not identify with, rather than cultural affiliation, over time this question has evolved into one about belonging to an ethnic group (or groups). This sense of belonging is self-perceived.

A.7 Who uses ethnicity data?

Information on ethnicity is used by government agencies, policy makers and administrators, researchers and community groups, including ethnic and cultural associations, to study the size, location, characteristics and other aspects of the different groups. The data is used in the planning of services directed at the needs of ethnic groups in areas such as health, education and social welfare. It is used for the allocation of funds from government agencies to ethnic groups. Also, the measurement and assessment of the economic and social well-being of various ethnic groups is based on these data.

It has been argued that, for the purposes of measuring morbidity and mortality rates, ancestry data would be more appropriate than ethnic data, because of the perceived influence of genetics on health. However, research indicates that genetics play an insignificant part in determining health status in comparison to social cohesion and the egalitarian nature of a country (Wilkinson, 1992).

B. Issues

Introduction

A number of issues arise when collecting and producing information on ethnicity in official statistics. These issues apply to concepts, definitions, classifications, and outputs.

Issue One

B 1. How well is the concept of ethnicity understood?

Many people are not sure or do not know what ethnicity means and may answer the question as if it is about race, ancestry or nationality. When the term 'ethnic' is used in the media, it is often used to refer to 'minority' cultural groups. For example, ethnic cuisine means Indian, Japanese, Thai and Chinese, but not local New Zealand cuisine. The use of the term 'ethnic' implies that those who form the largest ethnic group in New Zealand are not an ethnic group, or do not 'have ethnicity'. People's understanding of the term is an important issue, as their responses affect the quality of ethnic data.

1.1 Understanding the term 'ethnicity'

While testing possible census questions, there was evidence that some people did not understand the concept of ethnicity. Also; in other collections, for example, vital statistics (births, deaths and marriages), there is anecdotal evidence that people often do not understand the question. Specifically, some funeral directors feel that people have often answered the question on the basis of ancestry or nationality.

The ACNielsen (1999) report commissioned by Statistics New Zealand to evaluate the changes in the Census 1991 and Census 1996 ethnicity questions states that:

> defining what 'ethnic group' you 'belong to' is not a wholly objective notion; some paraphrase it as 'identity', others as 'race' or 'blood' or 'nationality'. It would appear that, to most, it is a mix of both ancestry and identity and that these are often inseparable in defining who you are. (p 31)

The ACNielsen report concluded that phrases used in the question may be influencing respondents. When both Māori and non-Māori were asked to explain the term ethnic group, they were more likely to say ancestry or blood than identity. However, when asked to explain 'belong to' they would respond with identity or being a part of a group. People in the study considered that the ethnic question did mean identity and that identity referred to 'who they are or what they are' (p 30).

The report concluded that the provision of more response tick boxes in 1996 than 1991, and the wording of the question, encouraged people to answer on the basis of ancestry rather than cultural affiliation.

1.2 Cognitive testing

Cognitive testing of the ethnicity question by Statistics New Zealand using tick box responses, revealed that people find the question easy to answer. However, people often make a decision based on the categories provided, and the order of these categories. New Zealand Europeans tend to think of their ancestry when answering, for example Irish. In regard to how people form their responses to the ethnicity question, it is very difficult to interpret whether the response is based on nationality, race or ethnicity. Some people may regard the terms 'race' and 'ethnicity' as synonymous or may regard 'ethnicity' as a euphemism for 'race' (Ratcliffe, 1996).

1.3 Response categories in questionnaires

Tick boxes may be another factor contributing to confusion about the ethnicity question. People may not read the question and skip to the response categories for clues on how to answer. The presence of tick boxes labelled with general nationality-type terms, eg 'Chinese' and 'Indian', may suggest to some respondents that the question is about nationality. Also the provision of the Australian response category but no New Zealander category, may have promoted confusion about nationality and ethnicity.

The 1996 Census, had help notes that gave the following brief explanation of the question: '*This question is about the ethnic group or groups (cultural groups) you belong to or identify with. It is not asking about nationality or citizenship*.'
Most respondents, however, do not read the help notes, so these explanations are of somewhat limited value in trying to help communicate what ethnicity is.

1.4 Summary

Responses to ethnic group questions are influenced by people's understanding of the term ethnicity, and by factors such as their ancestry, nationality, culture and religion. People's reported ethnic group(s) can change over their lifetime, either because of a change in perception or a change in understanding of the question asked of them. Both the context in which the question is asked and questionnaire response categories influence responses. With these issues in mind, ethnicity is not considered to be as robust a variable as some others. Issues for consideration are:

- What do the terms ethnicity / ethnic group mean to you?
- Is ethnicity a prescribed or ascribed characteristic?
- Should there be response categories or should there be the question and a space for people to write in their ethnic group(s)?

Issue Two

B 2. How to describe the largest ethnic group in New Zealand

The issue of how to describe the largest ethnic group in New Zealand is not new. Describing the largest ethnic group is a problem for other countries too. Naming a group is clearly a sensitive issue and something which people feel strongly about. As Bates et al (1995) point out, names have much symbolic and emotional meaning, both for the people who identify themselves as members of a group, and for others. The diversity of the terms used to describe this group, and the fact that all generally-used terms are not universally accepted, makes naming difficult.

2.1 Pākehā

A definition developed by Paul Spoonley (1988) is that 'Pākehā are New Zealanders of a European background, whose cultural values and behaviour have been primarily formed from the experiences of being a member of the dominant group in New Zealand. The label excludes those who continue to practise minority group ethnicity: the Chinese, Indian, Samoan, Tongan groups etc; and those European groups who retain a strong affiliation to a homeland elsewhere and reproduce this ethnicity in New Zealand.'

The term 'Pākehā' is used in relation to 'Māori'. The Oxford Dictionary of New Zealand English defines 'Pākehā' as 'a pale-skinned non-Polynesian immigrant or foreigner as distinct from a Māori'.

There has been mixed response to the term 'Pākehā', with strong responses through the media, both in editorials and letters to the editor. For example, when the Office of the Race Relations Conciliator ran an advertising campaign to stimulate debate about racism, there was criticism of the use of the term 'Pākehā' in the advertisement. In response to this, the Office produced a pamphlet emphasising that New Zealanders do not have ethnic descriptions imposed upon them, but choose themselves how they want to be described. The pamphlet explained that the word 'Pākehā' is commonly used to 'describe fair skinned New Zealanders ... and that it is principally used to refer to New Zealanders of British or European ancestry.'

'Pākehā' is seen by many as a positive and known descriptor for the 'New Zealand European' category. Many academics use the term and there is also anecdotal evidence that it is more widely accepted in the North Island.

2.2 European

'European' is seen as a category that denotes being 'white'. The Oxford Dictionary (1995) defines it as 'a native or inhabitant of Europe; a person descended from natives of Europe; a white person; a person concerned with European matters'. People who live in England, Scotland, Wales and Ireland do not think of themselves as 'European'. They view Britain as being separate from Europe and criticise the category 'European' as being inappropriate in describing them. The term is also considered to be inappropriate by people whose families have been in New Zealand for several generations.

2.3 Comments on the 1996 Census question

The term used in the 1996 census to describe the largest ethnic group in New Zealand was 'NZ European / Pākehā'. Respondents have objected to this term on the grounds that:

- the term 'New Zealand European' is inappropriate and these respondents do not consider themselves to be 'European'
- the term 'Pākehā' is correct and not 'New Zealand European'
- the term 'Pākehā' is incorrect
- for many, 'Pākehā' has the specific meaning of non-Māori or non-Māori European
- the term 'New Zealander' should be used.

There has been a public reaction to this issue after the 1996 Census; increasing again before the 2001 Census. There were letters to the editor in newspapers, a series of letters and articles in recent issues of the *Listener*, letters sent to Statistics New Zealand, and complaints at births and deaths registries. An important point to note is that some respondents actually object to the question itself, rather than just to the use of the term 'New Zealand European / Pākehā', and make statements such as 'we are all New Zealanders'.

2.4 Census responses of 'New Zealander', 'New Zealand' and 'Kiwi'

In the 1996 Census, there were a total of 58,614 written responses of 'New Zealander', 'New Zealand' and 'Kiwi'. The counts were as follows:

	1996
New Zealander	46,743
New Zealand	6,388
Kiwi	5,483

In the 1986 Census, there were 20,313 responses of 'New Zealander'. It seems likely that the number of 'New Zealander' and other similar responses will continue to increase.

These responses are coded to the 'New Zealand European' ('NZ European / Pākehā' in 1996) category. The characteristics of people giving these responses, for example their country of birth, whether they have iwi, the languages they speak, and possibly their religious affiliation is the subject of a Statistics New Zealand research project and the results will be available during the review.

2.5 The pros and cons of having 'New Zealander' as a category

People often ask for a 'New Zealander' response category to the ethnicity question or respond with 'New Zealander' to this question in surveys and censuses. The ACNielsen report showed that 21 percent of non-Māori and 5 percent of Māori in their study, preferred the term 'New Zealander'. It can be argued that 'New Zealander' is an ethnic group and that there has been sufficient time for this ethnic group to evolve. In support of this notion, 'Australian' is a recognised European category in the present classification (note Australian aboriginal also has a category). Others question whether sufficient time has elapsed for an ethnic group called 'New Zealander' to emerge.

The 1990 edition of The Concise Oxford Dictionary gives two meanings for the term 'New Zealander'. The first meaning treats it as a nationality; the second meaning treats it as indicating a person's ancestry:

- a native or national of New Zealand, an island group in the Pacific
- a person of New Zealand descent.

There are many people in New Zealand who have at least several generations of ancestors who were born in and lived in New Zealand, and thus would be quite correct in describing themselves as being of New Zealand descent. The term 'New Zealand European' can be regarded as meaning a person who lives in New Zealand, is of European descent, has white skin and has cultural roots in Europe. If this interpretation is accepted, then it can be seen that, with the passing of time - and with succeeding generations of people being born in, and living in, New Zealand - this term will become increasingly less appropriate. The sense of connection to Europe is diminishing, and the cultural similarities with European ethnic groups such as the English and Irish are being lost. People falling into the 'New Zealand European' category are likely to increasingly regard themselves as being of New Zealand descent, rather than of European descent and culturally different from European ethnic groups.

The term 'New Zealander' cannot only be seen in the light of European ancestry. There are also many people who describe themselves as 'New Zealanders' and do not have European descent, white skin or cultural roots in Europe. These are recent immigrants from non-traditional source countries such as Malaysia.

As the dictionary meanings show, the term 'New Zealander' is also used to refer to a person's nationality. Having 'New Zealander' as a tick box category in the ethnicity question may lead to confusion about what information the question is asking for. There may be undercounts of some smaller ethnic groups if they respond with 'New Zealander'.

One of the formal recommendations made at the Ethnic Death Statistics Workshop in 1996 was, 'that a better set of questions be developed to help clarify the purpose of the ethnic questions in respondents' minds.' In particular it was suggested that a question about nationality/citizenship and possibly a question asking for country of birth should immediately precede the ethnicity questions. It was felt that the inclusion of such questions would help improve the quality of the data. Another point made was that only 'Māori' and 'New Zealand European' are given the opportunity to identify their 'New Zealander' connection in the ethnicity question, yet many other groups also wish to identify as being 'New Zealanders'.

2.6 2001 Census ethnicity question

For the 2001 Census, Statistics New Zealand decided to revert to the 1991 format after research and evaluation showed that the 1996 question encouraged people to answer on the basis of ancestry rather than identification. The effects of this change were the removal of the word 'Pākehā' from the category 'NZ European / Pākehā', and the dropping of six sub-categories of 'other European' (English, Dutch, Australian, Scottish, Irish, and other). Another change was the removal of 'New Zealand' from 'New Zealand Māori' because there were objections to having New Zealand as a descriptor for 'Māori'.

The 2001 Census question and tick box responses are as shown:
Which ethnic group do you belong to? *Mark the space or spaces which apply to you.*

New Zealand European

Māori
Samoan
Cook Island Māori
Tongan
Niuean
Chinese
Indian
Other (such as DUTCH, JAPANESE, TOKELAUAN). Please state:

2.7 Summary

There are problems with terms used for categories within the classification. There is a lack of agreement about what term best describes the largest ethnic group in New Zealand. For example, some prefer 'Pākehā' and others 'New Zealand European'. Across all ethnic groups, an increasing number of people answering an ethnicity question refer to themselves as 'New Zealanders' or 'Kiwis'. Besides 'Māori', response categories currently give 'New Zealand Europeans' the opportunity of showing that they culturally identify with New Zealand. People wish to identify as 'New Zealanders' and there is a need to accommodate this view within a set of questions designed to improve the quality of the data collected. The major issue for consideration is:

- How should we classify the majority group in New Zealand?
- If 'New Zealander' were to become a separate category, where would it fit in the revised classification? Would 'Kiwi' be treated the same?

Issue Three

B3. Māori ethnicity

The tangata whenua (indigenous population) of New Zealand is measured in the census using three questions: the ethnic group question, the Māori descent question and the iwi/rohe affiliation (tribe/home area of tribe) question.

3.1 Definition of Māori

The Dictionary of New Zealand English, (1997), defines Māori as:

1) normal, usual, ordinary (adj), eg tangata māori means ordinary human being. The assumption that 'māori' was the noun was perhaps a significant factor in the use of Māori to describe the indigenous population.
2) native or belonging to New Zealand, Māori (a comparatively modern use)
3) person of the native race, New Zealander, Māori
4) a member of the Polynesian race who first peopled New Zealand; a person whose ancestry includes one member of that race.

3.2 Māori ethnicity

The issues of whether 'Māori' is an ethnicity and the use of the term 'Māori' to describe ethnicity have been raised. However, these issues will be discussed in the Māori perspectives paper, one of the series of papers produced for the review of the measurement of ethnicity. A short description of some of the terms used to describe Māori follow.

The term 'Māori' used to describe the original inhabitants of New Zealand developed in relation to the arrival of Europeans. Previously, the indigenous people of New Zealand named themselves by iwi and hapu. H W Williams' (1971) Dictionary of the Māori language reports that the term may have originated with the Māori themselves and this view has some support from the Dictionary of New Zealand English. Others would say

that the term came about from Europeans assuming that ‘māori’ was the noun and used that to label the indigenous population.

The term ‘Māori’ has been in common usage to describe the indigenous population since 1850. However Māori were also called ‘Indian’ in the 18th century, ‘aborigine’ and the ‘New Zealanders ‘ in the 18th and early 19th centuries. The government’s official term was ‘native’ and this changed to ‘Māori’ in 1947 (Dictionary of New Zealand English, 1997).

For more information regarding this topic, there is a Māori perspectives paper.

Issue Four

B 4.The structure and content of the classification

4.1 Current classification

The structure and content of the current ethnicity classification has evolved to include a mixture of conceptually-defined ethnic groups and commonly-reported responses, causing inconsistencies in the way groups are named and classified.

The classification system for ethnicity is hierarchical and composed of four levels. Lower levels are aggregated to a higher level so that a reported response fits into only one category, at each level, of the classification.

It needs to be noted that, except for ‘Māori’, the categories at the highest level of the classification are not individual ethnic groups. They are broad groupings that contain a number of ethnic groups. Some groups may be very different from other ethnic groups falling under the same broad category. For example, the level one category of ‘European’ contains ethnic groups as diverse as ‘Welsh’, ‘Russian’ and ‘Australian’. The other level one groups are ‘New Zealand Māori’, ‘Pacific Island’, ‘Asian’ and ‘Other’ ethnic groups. Level two uses 21 categories and the lower levels, three and four, have increasing numbers of categories.

4.2 Classification revision

The role that aggregation hierarchies should have in a revised ethnicity classification needs to be considered. If hierarchies are to be used, then the underlying criterion might include structuring the hierarchy based on geographic boundaries, or grouping like ethnic groups or basing the hierarchy on nationality. For a geographic basis see the Comparison of the measurement of ethnicity in Australia and New Zealand.

A possible alternative to the current classification is to dispense with the aggregation hierarchy and adopt a flat ethnicity classification. This would have one level only with no aggregation, so each identified ethnic group would stand alone.

The classification must be able to accommodate a variety of different responses. While conceptually defining groups at the lower levels is important, reported responses that may be a country name or a blended nationality-ethnicity term need to be categorised. This has affected the consistency of describing and categorising ethnic groups within the current classification. It may not be possible to remove all nationality-type terms as ethnic groups can be synonymous with a country (or region) eg Canadian. In some instances, nationality terms are the only terms that are in common usage. The revised classification needs to take a consistent approach in addressing these responses (see 4.3).

4.3 User requirements

The collection of detailed responses with the ability to aggregate these responses within broader descriptors has been the basis for the current classification. The revised structure of the classification, whether flat or hierarchical, needs to incorporate ethnic groups that are important for policy purposes. The identification of these groups is affected by factors such as the question asked of the respondent, the meaning the respondent ascribes to the terms used, the tick boxes provided and the written responses reported (see Issue 1).

Some ethnic groups may be small in number but are of considerable policy and general interest. It may be important to separately identify these groups, for example, former refugee populations such as the Bosnian ethnic group which is coded to 'South Slav nec' (not elsewhere classified). Additionally, with changes in patterns of immigration the classification does not identify some migrant groups. An example was the Somali population that was not coded separately for the 1996 Census with the result that this group cannot be identified except by using surrogates such as language and birthplace. The disadvantage is that this type of analysis includes those who may identify with an ethnic group other than Somali, and excludes those who do not have the language of their ethnic group or were born in a country other than their homeland.

The ethnicity question asked and the response categories provided influences how people respond (see Issue 1.1,1.2,1.3). The use of broad descriptors as response categories for an ethnicity question does encourage people to provide broad responses rather than their specific ethnic group. In the 1996 Census, for example, over 90 percent of responses classified under the 'Cook Island Māori' category were coded to the not further defined (nfd) category rather than to one of the specific categories such as 'Rarotongan', because of the 'Cook Island Māori' response category provided. This lack of detail applied to Chinese and Indian as well, as 90 percent of their responses went to nfd. Broad category responses also influence how people belonging to other ethnic groups answer the question. For example 80 percent of Sri Lankan responses were coded to the nfd category, rather than an ethnic group.

4.4 Classification principles

The principles of classification include mutually exclusive categories, ie a response fits into one place, exhaustive categories, ie all responses have a place, and a consistent approach in classifying responses.

Specifically within the current classification there are problems with mutual exclusivity with some categories. For example, the term 'Celtic' is not mutually exclusive from other categories and is more an umbrella term. Level four categories under 'British and Irish' include 'Celtic', 'Cornish', 'Gaelic', 'Irish', 'Manx' and 'Welsh'. Six of these groups are definitely Celtic. 'British nec' (not elsewhere classified) may also contain some Celtic groups.

Another mutually exclusivity problem is the category 'Black', currently at the lowest level of the classification, under the broad category of 'African, or cultural group of African origin'. The term 'Black' is commonly used in both America and Britain, for example, so a respondent could belong to the 'African American' category or one of the other African ethnic groups. It is also a race term and shows the inconsistency of the basis of the current classification.

Instead of a uniform approach, there is a mixture of concepts used in determining categories within the classification. For example, at the lowest level of the classification, nationality terms are used to describe Chinese ('Singaporean Chinese', 'Malaysian Chinese', 'Hong Kong Chinese') rather than ethnic group terms ('Hakka', 'Foochow', 'Teouchiou'). The use of nationality to describe Chinese ethnic groups is not accurate, except perhaps for the Chinese in Thailand, almost all of whom are of the 'Teouchiou' ethnic group. It is also significant that there are very few people coded to the nationality-Chinese codes, except for Taiwanese Chinese. In contrast, at the lowest level, Indian groups are described in ethnic group terms ('Gujarati', 'Punjabi', 'Bengali') not nationality.

Using an inconsistent approach causes problems when categorising some responses. If 'Ethiopian' is reported it is included within the 'Other African nec' category. However, if the response is 'Amhara' or 'Oromo', the ethnic groups of most Ethiopians in New Zealand, then these responses are placed within the 'Other Middle Eastern' category. 'Amhara' and 'Oromo' ethnic groups have closer ethnic ties with the Middle East.

The constraint of having an exhaustive classification is that within 'other' and 'nec' categories there are very dissimilar ethnic groups. For example, there are few separate categories within African for ethnic groups and so a large number of ethnic groups are placed within the 'Other African nec' category. This is a problem, as the categories no longer reflect the ethnic groups living in New Zealand.

4.5 Updating terms

'Pacific Island' is the term currently used in the classification to describe the broad grouping encompassing people who belong to ethnic groups such as 'Samoan', 'Cook Island Maori', and 'Tongan'. This term also appears in some outputs. The term now preferred by the Ministry of Pacific Island Affairs is 'Pacific peoples' as it better describes those born in the different island nations, and those born in New Zealand and elsewhere, that make up the Pacific population.

Two other descriptors which were not used for the 2001 Census, 'New Zealand European/Pākehā' and 'New Zealand Māori', need updating in the revised classification.

4.6 Summary

The ethnicity classification needs to reflect the key uses made of the data; cope with responses that are nationality, country and ethnic group terms; and specifically cater to the collection of groups represented in New Zealand. There are a number of issues that need considering here:

- Should the classification structure be based on anthropological, geographical, national or other characteristics?
- Should the classification continue to be a mixture of nationality, race, ancestry and ethnic group concepts?
- How should the actual content of the classification be set out - as a flat structure or hierarchical?
- What ethnic groups (or groupings) need to be identified at the higher levels?
- How can the classification cope with the variety of conceptually-different responses?

Issue Five

B5. Ethnic data output and the priority recording system

There are a number of ways that ethnic data are output, catering for multiple responses to the ethnicity question.

5.1 Current output practice

Currently ethnic data are output in three ways:

- **total response** (overlapping category) output - respondents are assigned to each of the ethnic groups that they specified. For example see table 22b (p 248–59) for 'Total Response by Sex and Industry' in the 1996 Census publication 'Ethnic Groups'.

- **sole/combination** output - there are sole ethnic group categories for respondents who report only one ethnic group, and combination categories for respondents who give more than one ethnic group. This does not change the responses people give and reflects the diversity of the population. Sole data for a group may also be a proxy for those who have a strong affiliation with their ethnic group. For an example of this output, see Reference Table Excel file for 'Ethnicity – Detailed Single and Combination by Age Group and Sex' in the 1996 Census publication 'Ethnic Groups'.

- **prioritised** output - each respondent is allocated to a single ethnic group using the priority recording system (see 7.1 for multiple response numbers). For example, the Household Labour Force Survey collects up to three ethnic groups but uses priorities outputs at level 0, European, New Zealand Māori, Pacific Island and other ethnic groups. Household Labour Force Survey, Table 5, Total Persons Employed, Unemployed and not in Labour Force: March 2001 quarter, Hot Off The Press.

5.2 Priority recording of ethnic groups

Prioritisation of ethnic group data assigns each person to just one ethnic group, when a multiple response is given. This was designed for input when an input system could only code one response, and it is unclear whether it was intended for output use. Data collected for ethnicity may be prioritised both at input and/or at output, depending on the particular survey or census requirements. The 1996 Census, output single and combination ethnic groups in publications, as well as total response. Priority coding was not used in the 1991 Census.

5.2.1 Use of the priority recording system in coding ethnic group responses

The priority recording system was developed separately from the ethnicity classification particularly for coding systems that had single fields. It gives priority to non-European groups and special priority to Māori and Pacific peoples, when multiple responses are given for the ethnicity question. It is used in both input and output. For example, some surveys collect more than one ethnicity but only one ethnic group is assigned for input using the priority coding system. The result is the loss of detail of the specific groups each person has identified with, as well as the data being produced on assumptions about identification that may not be appropriate.

Up to three responses to the ethnicity question were input for the 1996 Census and up to six are being captured for the 2001 Census. When more than six responses are given, the priority coding system will be used to determine which responses to code.

There are likely to be few and these will be prioritised at level four of the classification. Between level one groups, Māori have priority coding, after that Pacific peoples, then Asian, other ethnic groups besides European, followed by 'Other European', and finally NZ European. Ethnic groups within the same category at level four of the classification (eg Indonesian and Thai) are prioritised according to the size of the population within New Zealand.

The prioritisation rules covering multiple ethnicity are exhaustive and based on principles that need to be re-examined for relevance, acceptability and sensitivity. They were developed based on 1991 census data. There has been no revision to take account of 1996 and 2001 Censuses' data, or capture the change in the ethnic make-up of New Zealanders, because of the changes in the 1996 and 2001 Censuses' ethnicity questions.

The underlying rationale of the ethnicity priority recording system for the purposes of input, from the New Zealand Standard Classification of Ethnicity 1993, is that it should:

- ensure that important but numerically small groups are identified from the largest ethnic group;
- ensure that Māori and Pacific Island continue to be identified as this data provides information for policy decision-making; and
- ensure those shown statistically to be disadvantaged in some way are known, for the same purpose.

This rationale has been extended to output, because of user demands, although it contradicts the definition of ethnicity used by Statistics New Zealand. Unfortunately, many users have grown to rely on the simplicity of single group prioritised data output. However, a rapidly growing number of social analysts prefer using total response data. In the 1991 Census, sole/combination was the key output and prioritised data was not used.

5.3 Limitations

The importance of capturing the diversity of ethnic groups present within New Zealand is reflected in the output method used. Each output method has different limitations listed below.

5.3.1 Limitations to total response (overlapping category) output

The total (overlapping) count approach limitations are considered to be that:

- percentages do not add up to 100 percent; and
- total counts cause concerns of 'double dipping' in health funding (ie a person who is both Māori and Pacific People could be counted twice and thus funded twice) and need careful interpretation for electoral proportions.

Whatever limitations this approach may have, it is the only way of counting all the people belonging to a specific ethnicity. It does not 'over-count', however, the resulting table does not add up to the total population.

5.3.2 Limitations to sole/combination output

A sole/combination table for the whole population can get quite large and there is the problem of managing this in a practical way. A level two output has been used in the past; however this might not give enough detail for specific groups, for example the Pacific people population.

5.3.3 Limitations to prioritised output

Prioritised output has been criticised for the following reasons:

- One of the main criteria stipulated in the definition of ethnicity is that a person can belong to more than one ethnic group. The question caters for multiple response, but prioritisation contradicts this.
- The question does not ask people to identify the ethnic group they identify with most strongly, and respondents are unaware that prioritisation makes this choice for them. In most cases they would be unable, or unwilling, to self-prioritise if asked to.
- It places people in specific (high priority) ethnic groups; this simplifies yet biases the resulting statistics.
- It over-represents some groups at the expense of others; users have criticised it for this reason.
- It causes problems when considering population trends and projections, for example, losing people from an ethnic group through prioritisation changes the rates used for calculating trends.

In relation to the last point, prioritised output is becoming an increasingly unacceptable option. For example, birth statistics show that 25 percent of Pacific children also have Māori ethnicity. Using prioritised counts will substantially understate the Pacific Peoples population and boost the Māori population. Another example is that groups perceived to be disadvantaged might be given priority at the expense of others, and so increase their counts. For example people with both Samoan and Niuean ethnicity in New Zealand are lost from the Samoan population in prioritised output because the Niuean population has priority, being smaller.

5.4 Summary

There are problems associated with ethnicity output. When the priority recording system is used, it retains only part of the information given by respondents because it excludes people from all but one of their chosen ethnic groups. Prioritisation is contrary to the self-perceived definition of ethnicity and to multiple group identification. The relative demographic and socio-economic ranking of groups may be misreported purely as the result of prioritisation. Total response output counts all those who indicate they belong to an ethnic group; therefore, overall percentages are greater than 100 percent. Sole/combination output allocates everyone to a single category of sole or multiple ethnic groups. These issues need considering:

- What are the issues around using total responses and/or single/combination responses?
- What coding rules, if any, should be used for multiple ethnicities?
- Should data be prioritised for output?
- Should there be rules for prioritisation? If so, what should they be?

Issue Six

B 6. Changes in the ethnic question from 1991 to 1996

6.1 Findings from the 1996 Census

There was a significant increase in the number of people who gave a multiple response to the ethnic group(s) question in the 1996 Census because of the change in question from 1991. In the Ethnic Groups topic report it is stated that:

'The proportion of people reporting one ethnic group has fallen from 94.6 percent in 1986 to 81.0 percent in 1996. Over the same period, the proportion of people reporting two ethnic groups increased from 4.0 percent to 11.2 percent, while the proportion of people reporting three ethnic groups rose to 3.6 in 1996 from 0.3 in 1986' (p15).

Particularly noticeable is the increase in the number of people reporting both 'European' and 'New Zealand Māori', which rose to 170,916 in 1996 from 90,543 in 1991. Also very noticeable is the dramatic increase in the number of people with two European groups, which rose to 162,213 in 1996 from 21,507 in 1991.

The large increase in multiple response in the 1996 Census was not expected, although the change in the wording of the question made it clearer that a multiple response could be given. There is evidence of people responding on the basis of ancestry because they misunderstood the question (ACNielsen, 1999). Some of this increase in multiple response appears to be due to processing problems.

A study of the 1996 Census responses by the Survey Methods Division showed that approximately 9,200 people who indicated that they did not have Māori descent were incorrectly processed as having Māori ethnicity. Invalid marks and corrections by the respondent in the Māori ethnicity field were the main cause of this problem (Census Data Quality Evaluation, 1996). During development of the census questionnaire, it was thought that having New Zealand Māori placed first might result in people mistakenly ticking it, because they saw 'New Zealand' but did not see 'Māori'. During testing, however, there was no sign of this problem.

For the 2001 Census, marks were used instead of ticks and there was more space allocated between response boxes. The number of responses captured for ethnicity was increased from three to six.

6.2 Multiple responses

The ACNielsen (1999) report was commissioned by Statistics New Zealand to evaluate variations in the census ethnicity question from 1991 and 1996. The findings indicated that the inclusion of the six 'other European' categories was the single most important factor encouraging people to report multiple ethnicities at the 1996 Census. The findings also show that many Māori who gave multiple responses considered the question to be asking about their ancestry. In contrast, those who identified as sole Māori were not as likely to consider ancestry.

The report suggests that the major effect of changing to the 1991 ethnicity question, for the 2001 Census, will be a decrease in the number of people reporting multiple ethnic groups. The expected decrease should be most obvious for the 'other European' categories.

6.3 Decrease in sole Māori response

Corresponding to the increase in Māori multiple response in 1996, there was a significant decrease in the number of people giving 'New Zealand Māori' as their only ethnic group (sole Māori). Data from the Ethnic Groups report shows that in 1991, 323,493 people (9.59 percent of the New Zealand population) reported that they belonged to the New Zealand Māori group only. In 1996, 273,438 people (7.56 percent of the New Zealand population) reported that they belonged to the New Zealand sole Māori group. Demographic population projections based on 'sole Māori' using the 1991 figures and 1991 Census question would show that 60,000 more 'sole Māori' were expected in the 1996 figures than eventuated.

Health researchers use the 'sole Māori' category as the denominator when calculating rates for morbidity and mortality. The drop in 'sole Māori' means that the denominator is smaller and this has created problems with time series data. Research by Statistics New Zealand supported the view that it was the change in question for ethnicity from 1991 to 1996 that was responsible for the drop in numbers. The return to the 1991 Census ethnicity question for 2001 is expected to increase the size of the sole Māori population, as the 1991 question appears to provide a better measure of 'sole Māori' (ACNielsen, 1999).

Questions have been raised about using sole Māori data when calculating morbidity and mortality. Sole Māori has been used as an equivalent to the 'full Māori' category under the old race/ancestry/fractions of blood approach used previously. However, a person who gives their only ethnic group as 'Māori', is not necessarily only of Māori descent, and may have no Māori ancestry.

6.4 Summary

The ethnicity question and response categories were changed from the 1991 Census to the 1996 Census, causing a change in the way people reported their ethnic groups. Multiple ethnicities markedly increased for European and Māori, and the sole Māori responses decreased. Māori respondents show differences in the way they respond to this question. Those responding with sole Māori to the question are used in calculating rates for Māori. This practice has been questioned. Issues put forward for consideration are:

- How important to you is the continuity of the time series now in place for measuring ethnicity?
- Is ethnicity the right variable to define Māori when calculating rates in health outcomes?

Issue Seven

B 7. Defining household and family ethnicity

The concept of ethnicity is an attribute of a person, it is not an attribute of a household or family. In New Zealand there is a high rate of intermarriage between ethnic groups and therefore assigning a family group, or household, to one ethnic group is often not possible.

This poses considerable problems when producing any type of ethnic household or family statistics. Statistics New Zealand does not produce standard household ethnicity figures but does produce outputs on request, when the limitations of the data are made clear.

7.1 Household and family ethnicity

Household composition of individuals by ethnicity was output for 1996 using prioritised, level one data. Individuals by family-type were also output for ethnicity.

In the past, standard tables for ethnicity have been derived for household, dwelling and family output. The ethnic group of the occupier, or when that is not known, the spouse of the occupier, has determined the ethnicity of a household. Also, household ethnicity has been determined using occupier and spouse. If they were of different ethnicities, the priority recording system for ethnic groups, has been used to determine which ethnic group the household is assigned to. Likewise, the ethnic group of the parents or parent has determined the ethnicity of a family. If the ethnicities of the parents in a two-parent family were different, the priority system was used to determine which ethnic group the family was assigned to. For example, a family comprising of a Samoan father and an Indian mother and their children, would be categorised as Samoan.

The unit of analysis is the individual rather than the household or family when deriving data relating to households, families and ethnicity using the distribution of individuals method (Recommendations for Defining the Ethnicity of Households and Families, 1996). However, individual users, in order to reduce the complexity of analysis, have obtained customised data based on their own definition of household and family ethnicity (Callister, 1996).

7.2 Summary

Although not a standard output, household and family ethnicity has often been requested. The inherent difficulty is in defining household and family ethnicity, in a way that produces meaningful and useful data.

- How do you use ethnicity data to describe groups such as households and families?

Issue Eight

B 8. Implementation of a revised statistical standard and standard classification

8.1 Cost and considerations for implementation

Ethnicity is a widely collected variable and implementing a change in the ethnicity classification and standard will incur costs for the wider statistical system and users within Statistics New Zealand. It will take time to introduce a revised standard as there is a wide range of users. They range from large users, for example, central government to small users such as health centres.

Presently, there are many different modes of collecting data, with quite different response categories across different sectors. Forms can be self-administered, filled in by an interviewer and/or filled by proxy. These different collection methods and different instruments (telephone, face-to-face interview) affect the data that is collected. Therefore, a co-ordinated approach is needed to promote the revised standard to ensure it is utilised across all sectors in a consistent manner. Additionally, there is a need to gauge the commitment of stakeholders to use a revised standard and classification for ethnicity.

A revised classification will need substantial development work on the part of Statistics New Zealand and will incur administration costs. This may involve generating new codes for processing systems, changing software, printing revised hard copies and training personnel. Old processing systems may only take a one-digit code. Surveys like the long running Household Labour Force Survey would not be able to

accommodate more ethnic group categories with their current set-up. For all software systems, programmers would need to change the scanning and processing systems. There would be a transition period with both the current classification and standard, and a revised one, in use (for example, in ongoing surveys like the Housing Labour Force Survey). Substantial cost would be involved for those outside Statistics New Zealand for many similar reasons.

8.2 Development of questionnaire modules

New questionnaire modules may be required for census and surveys. The process of designing, formatting and programming these changes will affect the budget of various groups both within Statistics New Zealand and for external producers of ethnicity data. Ethnicity questions should capture the diversity of ethnic groups in New Zealand. The question should clearly indicate that more than one answer can be given. The influence of a change in question or in classification categories will impact to some measure on time series data.

8.3 Conclusion

The decision-making process in the RME will be assisted by stakeholders' providing information on: the present concept of ethnicity, issues raised in this paper, and whether there is a need to change or further define the classification. Constraints on the review are numerous and include the existing statistical infrastructure in central government, existing public knowledge, human and technical factors, classification principles, limitations of modes of collection, implementation cost and the requirements of the major users and collectors of the data. If there is a need to revise the ethnicity standard and classification, a commitment by users to the process of change will provide more robust data at collection and output. This will require both publicity and support for consistency in implementing the revised standard and classification in the wider community.

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Appendix A

Ethnicity - Attachment 1 - Recommendations of the Review Committee on Ethnic Statistics

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The development of a standard classification of ethnic group arose out of Recommendation 2 of the report of the Review Committee on Ethnic Statistics [New Zealand Department of Statistics: 1988]:

'That the Department of Statistics lead and co-ordinate the development of standard ethnic group classifications with associated instruments suitable for obtaining standard ethnic data across all official surveys.'

The report also contained a number of other recommendations relevant to the development of a standard ethnic classification. These were:

'Recommendation 3
That, wherever possible, where information will be used in producing official statistics the method of reporting ethnic group is self-identification.

Recommendation 4
That official statistical surveys, in addition to any cultural affiliation measure, obtain information on Māori people on the basis of descent.

Recommendation 7
That the Departments of Statistics and Māori Affairs, together with other interested parties, investigate alternative options for describing the ethnic group of the majority Pākehā/ European culture in New Zealand.

Recommendation 8
That, where possible, Pacific Island groups are separately identified in ethnic statistics.

Recommendation 12
That the Department of Statistics investigates the feasibility of including, in the 1991 and subsequent Population Censuses questions which measure separately the descent (ethnic origin) and cultural affiliation (ethnic identification) aspects of ethnic group. The descent question may measure Māori descent only.'

Appendix B

For Classification of Ethnicity – scroll to the bottom of the page to access the downloadable files.