



Report from the review of equality data

Summary and recommendations

October 2007

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Remit of the data review

1.1. This review was initiated in response to a recommendation in the Cabinet Office-commissioned Equalities Review (ER) published in 2007 that *‘a cross-cutting Government review of current data needs is a fundamental and necessary starting point if Government and devolved administrations are to properly analyse, understand and address inequalities. This review should take the new framework of measurement as its starting point. It should report to a ministerial committee, with a specific timetable for action. And the Office for National Statistics (ONS) should be responsible for leading the review and for ensuring the data on equalities across Government and the devolved administrations meet existing and future need, nationally and locally’.*

1.2. The ‘framework of measurement’ in the ER has the following features:

- It defines equality as equality of substantive freedoms, thus requiring information on outcomes, process and choice and control; and
- It lists seven equality characteristics and ten equality domains (see table 1.1).

Table 1.1 The measurement framework proposed by Centre for Analysis of Social Exclusion (2006)¹ and endorsed by the Equalities Review (Cabinet Office 2007)

Characteristic▶	Gender	Ethnicity	Disability	Age	Sexual orientation	Transgender	Religion/ belief
Capability domains or dimensions ▼							
Longevity	<i>[Information on outcomes, process and choice/control]</i>						
Physical security							
Health							
Education							
Standard of living							
Productive and valued activities							
Individual, family and social life							
Participation, influence and voice							
Identity, expression and self-respect							
Legal security							

¹<http://archive.cabinetoffice.gov.uk/equalitiesreview/upload/assets/theequalitiesreview>

1.3. The data review took place from June to September 2007 and the work of the review was guided by a cross-Government task force with members drawn from eight departments and the three devolved governments. The report considers the measurement of UK equality, with the understanding that the different government statistical organisations in the UK will need to work in partnership to achieve this.

The issues

1.4. The Equalities Review (ER) was unable to “*present a complete picture of inequality across all the relevant equality strands due to lack of data*” (p 139) and made a number of specific recommendations for improving existing sources.

1.5. It identified data quality issues which apply across the measurement framework, in particular data coverage (including coverage across the UK and coverage of non-household groups within countries) and data quality (including inconsistencies in classification and use of proxy measures).

1.6. It highlights the importance of understanding and measuring the ‘cascade’ effect where disadvantage in one area of life sets off inequality in others. For example, low educational attainment, employment and health are all linked.

1.7. In addition, the ER made a robust case for improvement to accessibility and presentation of equality data.

1.8. Throughout the course of this data review, we considered whether the mechanisms currently in place were likely to deliver the kinds of improvements we believed to be necessary.

1.9. We also considered some of the conceptual and practical data issues which might arise in using the definition of equality and measurement framework proposed in the ER.

Findings of the data review – an overview

1.10. We found that there is more equality information available than reported in the ER and there are a number of data developments already underway which will improve the evidence base further. However our findings support the ER’s assertion that there remain a number of significant gaps in equality information.

1.11. Our findings suggest that the current lack of strategic coordination across stakeholders and data providers, particularly at a UK level, in building an equality evidence base has contributed to the current data gaps and inconsistencies. Should this continue it would be extremely difficult to improve the evidence base. This is particularly evident in the areas of harmonisation and data presentation. To address this, we have made a number of recommendations to improve coordination and proposed a principled approach to the collection and dissemination of equality data (see box).

The principles for collection and dissemination of equality data

Principle 1: Given resource and provider burden constraints, not all potential user needs for equality statistics can be met. User needs therefore need to be prioritised and periodically reprioritised as needs change. This should be done on the basis of an agreed and public set of criteria.

Principle 2: As the responsibility for equality statistics crosses many public bodies, changes need to be managed in a collaborative manner.

Principle 3: Equality should be measured and reported in terms of both causal factors and outcomes, using an agreed framework which facilitates comparisons and promotes awareness of multiple inequalities.

Principle 4: Consistency of methods, concepts and classifications is fundamental in the collection, analysis and presentation of equality statistics.

Principle 5: The methodology for collecting and analysing equality statistics needs to be improved, including for data collection and data linkage.

Principle 6: All equality data collected and information produced by public bodies should be publicly accessible within the constraints needed to preserve confidentiality. Users should be able to easily access equality data and reports; this includes the requirement for reasonable adjustments to be made.

Principle 7: Equality reports and publicly available data should be accompanied by guidance on limitations, appropriate use and interpretation of the statistics.

Principle 8: Equality data will be improved if people responding to requests for data understand the purpose(s) that the data will be used for, and those asking for the data understand and value the information as useful for their own purposes.

1.12. Harmonised concepts and questions have been agreed for the collection of survey data on a number of the equality characteristics. The exceptions are disability, sexual orientation and transgender. We have recommended urgent agreement on disability questioning as well as swift completion of current developments on sexual orientation.

1.13. While agreeing that harmonised classification is important, it will only contribute to improving the equality evidence base if the harmonisation has currency and is actually used in key sources. Harmonisation, where guidelines exist (chapter 4), is fair in the major sources we reviewed. Chapter 5 shows the extent to which harmonised approaches are used in a number of key Government and non-Government sources, predominantly surveys. There is no UK-level mechanism for influencing the harmonisation in administrative data sources. We recommend actions to encourage a wider use of harmonised approaches for equality characteristics.

1.14. Starting with the major data sources highlighted in the ER, we assessed the degree to which they intend to collect UK level information across the measurement framework, and found that at a very high-level the coverage is fair, with the exception of the transgender characteristic. We have described developments and identified specific issues for each source of

equality information (chapter 5 and annex B). We also recognise that it would not be possible, with existing sample sizes, to disaggregate UK (or GB) data sets to provide information at a local area or even country level for many of the equality characteristics, or to carry out much analysis across characteristics. In some cases, the total population size and spread mean that even trying to increase sample sizes will not enable an adequate analysis. However there are benefits to be realised from the developments of country level data sources.

1.15. For the priority domains, we audited the data available for a wide range of possible equality indicators which might be candidates for a 'focused basket of indicators' and addressed the specific data recommendations made by the Equality Review (ER) in each of the domains (chapter 6 and annex C). We recommend that this process is carried out across the measurement framework for remaining domains, which might include: Standard of living (including housing); Individual, family and social life; Participation, influence and voice; and Identity, expression and self-respect.

1.16. If the ER's framework is to be populated, the broadest gap in all the domains is in information on choice and control. A preliminary study to formulate questions on choice and control is needed to establish a robust methodology. A research brief for such a study is proposed in annex B.

1.17. We found that there is little coherence in the way equality information is presented and in some cases this will have contributed to the conclusions on paucity of data found in the ER. We have proposed actions for improving data accessibility and presentation (chapter 7), including learning from examples of good practice, as seen on the website of the Northern Ireland Statistics and Research Agency.

1.18. We endorse the ER proposal that an equality measurement framework should be adopted at a GB level², which meets the needs of users, although the communication of a measurement framework must be managed carefully to ensure that the equality characteristics are not seen as a 'shopping list' which should automatically be included in every data collection. Equally this communication will need to stress that the framework will not, in itself, solve all the analytical challenges involved in gaining a full understanding of inequality (as shown in the case studies in chapter 7).

1.19. There are a number of recommendations in this review which could be implemented immediately, but for the others, we have proposed five steps to advance this work:

- Agreeing the definition of equality and the measurement framework for GB/UK;
- Deciding which indicators should be in a focused basket;
- Prioritising equality data needs;
- Developing data collecting methodology;
- Improving data collection, analysis and presentation.

² It may not be possible to develop a UK-wide framework due to the different equality legislation in Northern Ireland. Within Great Britain it may be helpful to develop country specific frameworks in parallel to that for GB.

1.20. While we have not commented on the appropriateness of the particular definition of equality and the measurement framework proposed in the ER, we have recorded issues with the definition and proposed measurement framework raised by stakeholders and external reviewers during the course of the data review alongside the data issues shown above. These issues include:

- The relationship between equality and diversity and how existing Government priorities, like reducing child poverty, would fit with the framework;
- The division of domains and the relative importance of outcome indicators;
- The balance between equality in the private or domestic sphere and the public sphere (e.g. the workplace) and the responsibilities of individuals.




1.21. Finally, we recommend that a costed implementation plan is drawn up by stakeholders to assist consideration of the way forward.

1.22. The tables below show all the recommendations. We have estimated timelines for delivery of recommendations should the implementation plan be agreed.





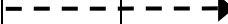

1.23. Where recommendations apply to matters of reserved policy from a devolution perspective, joint working will be needed to ensure equality data developments are fit for purpose, and the wording of recommendations reflects this. For devolved policy areas, it is essential we seek, where possible, to harmonise equality data collected across Northern Ireland, Scotland, Wales and England to provide a view for the UK as a whole. There are however no recommendations specifically for devolved statistics.

Table 1.2 Recommendations of the Data Review

Key:

	Time period for carrying out the recommendation
	Ongoing responsibility
	Report publication milestone

a) On strategy and processes for improving equality information

	Jan-Mar 2007-08	2008-09	2009-10	2010-11
<p>R8.3: We recommend that a cross-UK Government equality measurement group is set up. This group should:</p> <ul style="list-style-type: none"> • Provide an ongoing strategic overview of current collections of equality data with the objective of ensuring it is fit for purpose in the most efficient and least burdensome way; • Assess alternative approaches to collecting data; • Monitor and report on the implementation of the recommendations in this report. 				
<p>R8.1: We recommend that, in order to help prioritise the collection and analysis of equality information, the Government Equalities Office and their counterparts in devolved government should lead on agreeing a definition and measurement framework for equality. This should take into account the issues raised in this data review. Once this agreement is reached, guidance should be published on the application of the framework.</p>				
<p>R8.2: We recommend that Government stakeholders work with Equality and Human Rights Commission and wider stakeholders in achieving a focused basket of indicators for monitoring progress towards an equal society. This will be needed for each of the agreed equality domains and to agree priorities for filling information gaps.</p>				
<p>R8.4: We recommend that a costed implementation plan is drawn up by stakeholders to assist consideration of the way forward.</p>				
<p>R3.1: We recommend the collection and dissemination of equality data across UK Government should be based on a set of principles (such as those proposed in this report) within an agreed measurement framework.</p>				
<p>R7.1: We recommend that the Government Equalities Office and their counterparts in devolved government develop and implement a communication strategy with the objective of communicating the purposes of equality data.</p>				

b) For improving equality data comparability

	Jan-Mar 2007-08	2008-09	2009-10	2010-11
R4.1: We recommend that the National Statistics Harmonisation Group produce a report, for UK level data, on the current use of harmonised equality classifications in all regularly collected Government surveys and where possible key administrative sources, identifying where there are valid reasons for using other classifications which map onto the harmonised approach or using an entirely different approach.	●	●		
R4.2: We recommend that ONS in partnership with devolved governments steps up effort in championing the adoption of harmonised equality characteristic approaches in Government surveys and other initiatives which will improve comparability across sources. These should include consideration of the level of disaggregation of published data and providing user guides on collection and classification as they are agreed, using Ethnicity guidance as a model. Progress on this should be monitored and reported by the National Statistics Harmonisation Group at regular intervals.	- - -	◆	◆	▶
R4.3: We recommend that, as a matter of urgency, Office for Disability Issues and the Government Equalities Office in partnership with ONS and devolved governments, urgently agree a consistent approach to collecting information on disability, and champion this widely across Government and the wider public sector.	●	●		
R4.4: We recommend that Government agencies work with non-Government stakeholders to agree an approach to obtaining more equality information on transgender people and those undergoing the process of gender reassignment.		●	●	
R4.5: We recommend that National Statistics Harmonisation Group reviews its work programme. This should be done taking into consideration: <ul style="list-style-type: none"> • The report on current use of harmonised approaches (see R4.1); • The agreed set of equality characteristics for a measurement framework; • The need for improvements in administrative sources; and • The needs of stakeholders with different population profiles. 		●	●	

c) For filling data gaps and improving data quality

	Jan-Mar 2007-08	2008-09	2009-10	2010-11
<p>R5.1: We recommend that:</p> <ul style="list-style-type: none"> As a matter of urgency ONS completes preparatory work regarding a question on sexual orientation to allow it to be introduced into the Integrated Household Survey; and Harmonised questioning on sexual orientation should then be agreed and used by ONS, Communities and Local Government and Home Office in the Integrated Household Survey, the Citizenship Survey and the British Crime Survey. 				
<p>R5.2: We recommend that ONS promotes good practice in the use of data quality reports (published alongside equality datasets) containing information to help users assess the strengths, limitations and sensible use of the datasets.</p>				
<p>R5.3: We recommend that ONS builds on existing development work on collection of information from the non-household population in collaboration with Communities and Local Government (for both the homeless and gypsies and travellers where not in households), Department of Health (care homes), Ministry of Justice (prisons) and in partnership with devolved governments and produces regular progress reports on this topic.</p>				
<p>R5.4: We recommend that the Office for Disability Issues and ONS work together to develop best practice methods for collecting information from hard-to-reach groups of disabled people such as those with learning difficulties or those requiring proxy interviews and then publishes guidelines for this topic.</p>				
<p>R5.5: We recommend that if equality of substantive freedom is the accepted definition, that the Government Equalities Office initiates two development projects. The first should build on emerging good practice in the area of tackling discrimination seen in initiatives by the Healthcare Commission on discrimination, dignity and respect and in the Citizenship Survey. The second should build on existing research on measuring choice to develop tools for collecting information for equality of substantive freedoms.</p>				
<p>R5.6: We recommend that the Government Equalities Office emphasises the importance of data sources which allow cross-domain equality analysis and longitudinal equality data and works to ensure that collection of longitudinal equality data is funded beyond 2010.</p>				
<p>R6.1 We recommend that Government stakeholders with Equality and Human Rights Commission and other non-government stakeholders work together to extend the process of data audit we have described here for the remaining parts of domains we have considered, for example 'caring' within Productive and Value Activities, and to the domains we have not considered.</p>				

d) On data accessibility and presentation

	Jan-Mar 2007-08	2008-09	2009-10	2010-11	
R7.2: We recommend that the Government Statistical Service (GSS) promotes the commitment to data access, following the example of the GSS commitment to making gender statistics available.				▶	
R7.3: We recommend that: <ul style="list-style-type: none"> • In the short term, a better system of sign-posting existing equality information is developed for the National Statistics website and the feasibility of extending to other websites is tested; and • In the longer term, improvements to the way equality data are presented on official websites should be developed in partnership with a range of stakeholders including data users from the private and third sectors. The approach used on the NISRA website should be considered as a potential model. 	●	●			
R7.4: We recommend that the Government Equalities Office and their counterparts in devolved governments work with the Office for Disability Issues and a Disability Statistics User Group to develop good practice guidance for improving the physical accessibility of data and information for a diverse user group.		●	●		
R7.5: We recommend that Government Statistical Service and Equalities and Human Rights Commission review dissemination of equality data and analysis and develop an approach which would be consistent with the agreed equality measurement framework.		●		●	