

Measuring Social Categories in New Zealand: resources for social researchers

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“One essential condition for the development of sociological theory and of sociology as a scientific discipline is the comparability of data assembled by those engaged in research” T.H. Marshall (1969) (p.viii) cited in Burgess (1986):

Introduction:

There is a clear need for careful development of data-collection tools across the social sciences, so that Marshall’s comment on Sociology applies quite generally. (NB: Marshall is the author of the famous distinction between centuries in terms of which rights were developed: T. H. Marshall wrote a seminal essay in 1950 on "Citizenship and Social Class" which suggested that for England there was a development of citizenship as involving civil rights in the (18th, then political in the (19th, then social rights in the (20th.) This article reviews those data-collection tools (especially classifications but also scales) that have been developed for the New Zealand (NZ) situation. This article does not deal with either of two neighbouring topics:

- what information is routinely (or for that matter irregularly) collected;
- information and evaluation of data-collection procedures (e.g. response-rates).

This paper covers the current ‘state of the art’ about best social research measures for the NZ context. The listing is also a useful checklist for those contemplating which to include in the design of a survey or other social research project. It also establishes a research agenda for what further methodological research is required.

Theoretical Background:

Most data-collection tools are related to measuring particular social positions, and this article concentrates on these. We each hold an array of social statuses - with varying degrees of consciousness and intensity. Some are thrust upon us (ascribed) while others are voluntarily taken up (achieved) – or some mix. Some of these social statuses are biologically-based (although always socio-biologically as there is a socially constructed aspect, often overwhelming) and others social.

In our everyday lives we tend to priorities several of these statuses: for example work/life balance is a person’s subjective feeling about whether there is the best mix between their working and home lives. Some studies allow reporting of emphases amongst statuses (cf Crothers, 2013). It is also possible (to some extent) to examine more objective interrelationships amongst these statuses. There are also differences in the salience of different social positions: some are ‘latent’.

These social positions tie individuals back into the collective-shared social structure. They are sometime referred to as ‘social background characteristics’ or as ‘face-sheet variables’. Usually these are placed partly at the front of any questionnaire (or interview guide) – where this information is needed to guide sample selection or questioning – or more often at the back of the questionnaire. Some questions may be threaded in the body of the questionnaire/guide though where necessary for routing questions. In quantitative/survey research these variables are used to cross-tabulate results: that is to ascertain which of the potential range of characteristics seems most associated with the attitudes/behaviors etc. being considered. As demographers quip research looks into people “broken down by age and sex”

Survey questionnaires almost always include questions about a considerable range of social statuses, since the array we occupy/potentially occupy is considerable.

Margaret Stacey in the mid-1960s in the UK found that on average some N=14 variables were used, the most common included: age, sex, marital status, occupation, family and household size and composition, education, income, place of birth, housing, leisure activities, social class, religion and politics. Much the same topics are covered in Burgess’s 1986 book, namely:

[2 Age](#)

[3 Gender](#)

[4 Race and ethnicity](#)

[5 Health and illness](#)

[6 Education](#)

[7 Social class and occupation](#)

[8 Work, employment and unemployment](#)

[9 Leisure](#)

[10 Politics](#)

[11 Voluntary associations](#)

[12 Do concepts, variables and indicators interrelate?](#)

On the other hand Market research surveys tend to include only age, gender, ethnicity and location whereas large-scale academic studies (e.g. NZES) include a full battery and may include partner characteristics as well.

Such statuses may seem straightforward but they are often contested. Therefore there needs to be attentive to theorisations of the components of social structure and how these are changing. There are often linguistic issues in naming social statuses, especially if there is a cross-cultural aspect or across-time (since so much change). For example, Acceptable Ethnic terms in particular have changed considerably over time, but this same point holds for many other social statuses. A particular task in employing standardised measures is to improve over-time comparisons.

Although mainly deployed here as measures of individuals, many of these measures – plus additional - also pertain to collectivities: e.g. communities, firms, plants, groupings. Alternatives include using a ‘representative person’ (more-or-less a ‘spokesperson’). For Headship of household and related problems, Callister, et al (2007) is a discussion (focused on ethnicity) of the ways in which family-type collective units can be conceptualised (see also McCormack and Crothers, 2006)

NZ methodological and substantive studies have investigated some of these topics in depth and these are referred to below. However, the concentration here is on generally useable compromise measures cf. open-ended complexities. There should be some feedback between the two approaches so that the research feeds-in to the construction of the measure.

The ‘language’ of this paper is that of ‘variables’: which are defined as -

Variable: The representation of a social characteristic or social factor in empirical research. Variables are constructed by defining a concept and developing an indicator or indicators for a concept.

Indicators: A means of representing or measuring sociological concepts using items for which empirical data may be collected.

Considerations in developing/evaluating data collection tools:

As well as keeping abreast of theoretical concerns considerable experience is necessary when asking face sheet questions. The material in this paper concerns standardised, routine ways of collecting social background characteristic and other related information. However, they are not adequate for those researching more deeply into any of these statuses.xx

Data-collection instruments are not the whole story, and for at least some of these items there may be procedures to rework the data collected during (or prior to) the data-analysis phase. Different measures have different combinations of data collection and analysis. Flexibility of data-collection can be a virtue: e.g. collecting age in bands that are sufficiently tight that alternative ways of presenting them are possible.

Although such measures are more particularly relevant to Quantitative studies they are also relevant to more qualitative studies, especially when describing and in relating case study respondent characteristics to the general population. Since there is Also interaction field-work between social characteristics of researcher and data output these variables might also be used to describe characteristics of field-workers.

The gold-plate local standard is SNZ and sometimes social research tools ‘owned’ by other government departments or by some of the better-institutionalized and larger scale social research operations.. The key material is provided by SNZ in its List of classifications and statistical standards.

There are several reasons for this standard, although researchers may need to use other approaches where relevant, and esp. when there are good substantive reasons for doing so.

Using such tools allows hooking up more focused studies with census, official survey and indeed other official statistics. Another standard is international official social definitions which have advantage of better harmonising in cross-national comparative work.

SNZ etc. have the resources needed to develop and monitor social research tools, which individual researchers seldom have the means or inclination to work on. On the other hand some very useful classification tools have been developed by non-official statisticians.

international standards are also becoming more import, since there is concern for comparability and often data exchanges. Often harmonisation of classifications includes Australia and more generally is related to UN system categorisations with some local adaption.

The UK data archive has a question bank which may be useful <https://discover.ukdataservice.ac.uk/variables>. There is a considerable international literature on applicable measures: e.g. Hoffmeyer-Zlotnick & Wolf (2003).

There are some particularly important sources:

- SNZ has much material on census questions, their importance, etc. see for example <http://archive.stats.govt.nz/Census/2018-census/prelim-content/proposed-topics.aspx>
- Errington et al, (2008) is a carefully developed a guide to using data from the New Zealand Census: 1981–2006, so unfortunately is now becoming updated. An earlier, and not so fine-tuned guide is Crothers (1986).
- SNZ's GSS includes a range of survey questions
- [The Social Report](#) (Ministry of Social Development) includes methodological information on a range of social indicators
- Domain reviews extend coverage across the full range of data available in any broad area, and are renewed from time to time.
- Other government departments with a major social research expertise include MoEd, MoH, MOJ, & MSD.
- Survey research operations which might be relevant include NZES (Vowles), WIPNZ (AUT).

Social Categories

Note: related characteristics are grouped together: immediately after each title is a link to the SNZ standard.

1 Location: SNZ. [Geographic areas](#)

Underpinning any social activity is the place where it occurs (or the places it occurs between). The spatial architecture of NZ is underpinned by mesh blocks, on top of which are built several layers of statistically-defined spatial units, and intertwined with these several layers of local authority boundaries (Community boards, wards, local authorities and regional authorities). Given limited sample sizes regional groupings are sometimes used: such as NI v SI or also splitting the NI into two between the Auckland 'golden triangle) and areas south. For the newly developed spatial framework see <http://archive.stats.govt.nz/methods/classifications-and-standards/geographic-hierarchy.aspx>. See also Crothers (2018).

Another dimension is in terms of Community type: especially Urban/Rural. As part of recent work on spatial architecture a several level typology has been developed and mesh blocks assigned to each.

Apart from census enumeration those living on small islands or in non-private households are seldom covered: see SNZ (nd) 'People living outside the norm' for a social description of these.

There are also a range of derived measures of community type:

- The Index of Deprivation (e.g. MOH,nd)
- The public open space attributable Index (Chaudhury et al, 2017);
- Index of neighbourhood social fragmentation (Ivory et al (2012),
- Neighborhood destination accessibility Index (Witten et al 2011)
- Indices of Multiple Deprivation (IMD Exeter, et al 2017). Zhao, J., & Exeter, D. J. (2016).

2 Age: generation/prime age; [Age](#)

Age is a continuous variable, although some respondents may be vague leading to ‘age-heaping’ (a concentration at years ending with 0 or 5) fortunately not knowing birthyear – or age – is rare. People know their birth year more readily than their age so it may pay to ask for birth-year and then calculate the age. This provides detail allowing alternative categorisations. Age is usually used in age-bands. SNZ categories end in -4 and -9 with alternatives including 5, 10 and 15 year groupings.

In their GSS output SNZ has suggested 4 adult lifestages:

- Young people (15–24 years)
- Prime working age (25–44)
- Middle-age (45–64)
- Older people (65+).

‘Age markers’ are less definitive now than in previous years although there are still major boundaries around 15 through early 20s and perhaps in the 60s with the onset of retirement for many. SNZ has sometimes used named periods: one example is prime-age range (age 25–34). Recourse can be made to Life cycle stages: e.g. infancy, Childhood, adolescence, young adulthood, prime age, older adults, retirement, and senility.

While age is objective, it has subjective aspects: some people of the same age may well feel themselves older or younger than others, and age varies in salience.

Age implies likelihood of survival to later ages as given by life expectancy tables (see also health life expectancy). In addition, subjective Expectations of life expectancy may be relevant and have been asked in some surveys.

Obtaining birthyear can also feed into generation analysis. Generations are largely subjective although there are objective aspects such as the size of particular birth cohorts. Generations are considered age-groups bound together subjectively by shared life experiences such as wars, depressions etc. The US Pew Research Center has investigated generations and their definitions might be applied here – see for example Table 1, and Michael Dimock (2018). A NZ exploration is provided by Crothers (2016).

Table 1: Pew Generations

greatest generation	pre-1928
silent generation	1928-1945
Baby boomers	1946 -1964
Generation X	1965-1980
Millennials	1981-present.

3 Gender: Sexuality [Gender identity](#); [Sex](#)

‘Sex’ refers to the biological division into female and male; ‘genders’ to the parallel and socially unequal division into femininity and masculinity. Gender/sex/sexuality is straightforward for

many although complex around the edges. Sex is (misleadingly) often seen as dichotomous whereas there are various sexual characteristics and switching is possible. Gender is socially constructed and therefore can give rise to many alternatives, although subdivisions within these are seldom tapped. Also people can affiliate with a gender-related politics: e.g. feminism, gay pride etc. – see Calder-Dawe & Gavey (2016);

Studies have been carried out by OU (Teharne & Beres, 2016), AU (Greaves et al 2017a;b;c) and data is available from the NZES.

4 Ethnicity: [Māori descent](#); [Ethnicity](#); [Iwi](#)

There is a complex relationship amongst Race/Ancestry/Descent/Ethnicity/POB- /language. Previously race/ancestry/descent (synonyms but of varying user-friendliness, descent is probably the least intrusive) was seen simplistically as involving clear genetic inheritance with mixed race people fractionated according to their descent proportions. They are seen as objective (biological) characteristics although their social meaning is up for grabs. Multiple descent is frequent and only Maori descent seems to have any particular NZ importance (Maori Descent is often seen as a criterion for admission to iwi involvement and resources.)

An 'ethnic group' is a collectivity within a larger society having real or putative common ancestry, memories of a shared past, and a cultural focus on one or more symbolic elements which define the group's identity, such as kinship, religion, language, shared territory, nationality or physical appearance. Members of an ethnic group are conscious of belonging to the group'. Ethnicity is clearly socially-constructed and again many lay claim to multiple ethnicities. The SNZ classification broadly groups ethnicities into descent groupings and can include detailed subcategories. In surveys usually only the larger of these groupings are offered in tick-boxes (or similar) with other respondents being asked to write in their choices. Amongst the smaller categories 'ethnogenesis' or grouping occurs and the classification strays into COB categories. However, such groupings can be real inasmuch as they are adopted/accepted by those in such groupings. E.g. Samoans and Tongans may accept being lumped as 'Pacific People', although they can be fiercely differentiating when occasion demands. Accepted terminology changes over time: e.g. Pasifika, PIP, Pacific Peoples. The pertinence of categories can change over time too: e.g. 'White ethnics' are an interesting latent set of categories, whereas for many years they were highly pertinent categories. (See NZ histories of various UK 'regions' or constituent countries).

Usually information re ethnic affiliations is collected in a 'multiple response' format where respondents tick as many boxes as they need (although some may well abbreviate). Some 20% are MRs so the question arises about how these might be best aggregated? The current SNZ procedure is to multi-count: thus a Māori-Pakeha is included twice and someone with 4 ethnicities 4 times. This can seem odd though. An alternative is to assume that each ethnicity is of equal importance, thus dividing a person into fractions. An intermediate procedure is to use a 'prioritising' schema where people are assigned a key ethnicity according to a priority scheme: that used by SNZ assigned 1st anyone with any Māori ethnicity to Maori, then Pacifica, Asian and finally the residual Pakeha/NZ European. While there are statistical advantages to this approach it 'forces' social reality. Self-prioritised ethnicity is another approach (although not yet adopted by SNZ): multi-ethnic respondents are asked which of their ethnicities they see as of greater importance to them. Again, alternative formulations are possible: esp. allowing mixes or not. The meanings of ethnicity to NZers was much researched in the 2000s (see Special Issue on Ethnicity edited by Paul Callister (2009) in *Social Policy Journal of New Zealand: Issue 36* and SNZ studies in the mid-2000s) and some investigations into self-prioritisation was also accomplished (e.g. Kukutai and Callister, 2009). But earlier studies have only been partly updated: Hussain (2018).

Some studies have attempted to describe the more detailed content of ethnicities through developing identity scales – for Maori (Greaves et al 2017d, and Pacifica (Manuela et al 2015). On ‘Pakeha’ a recent reference is Forsyth 2018. (AN ISSP survey collected some useful information on preferred naming of Pakeha).

5 National identity/citizenship [Country; Language](#) [Year of arrival/years since arrival in New Zealand](#)

Nationality and Country of Birth (COB) relate to people’s involvement with countries/jurisdictions and involve legal (or semi-legal) framings, whereas ethnicities etc. are components within these – albeit with international linkages in many cases. There is a standardised classifications of countries which serves.

COB is largely objective although the meaning derived from this can be tricky. A difficulty e.g. is of Rhodesians whose ethnic identity might vary. Again, not all counties of the world can be used so regions are often substituted. (countries change and some have split since birth and some joined up.)

Nationality/citizenship refer to the legal status in NZ. Visitors have limited standing (although are caught by census enumerations), and residents are defined as those with a resident visa (see <https://www.immigration.govt.nz/new-zealand-visas/options/live-permanently/things-to-consider/residency>. ‘Citizens’ can access state resources and within this category can be discerned those who are registered for voting (although this is a legal requirement).

Beyond more legal aspects there are the meanings (changing over time and varying by social situation) of ‘NZ national identity’ (see Humpage & Greaves (2017).

For more general discussion of the contexts within which national identity develops see Mann (2017) & Hunter (2017).

For migrants, a consequent measures is years since arrival in NZ, although this doesn’t capture the extent to which they may have not be in NZ over this period (which would be number of years lived in NZ).

Also for immigrants, generation of migrancy (i.e. settlement in NZ) may also be important: the first generation are those born outside NZ while the second are those born to these migrants .. and so forth (see census and GSS for relevant data). Another relevant grouping is the one & a half generation migrants who were brought to NZ as children and so grew up here.

6 Usual residence

Another ‘residential status’ concept involves the distinction between de fact/de jure residence in a particular dwelling or area: probably only pertinent to the census enumeration – usual residents cf visitors. The basis for census data includes both although most data is provided on the basis of usual residence – thus visitors to other households are virtually migrated back to their place of usual residence.

People vary in the extent to which they ‘belong’ in particular dwellings: some move between dwellings on a regular basis (e.g. weekly) for workers or students whose main home is outside commuting range and longer cycles for those going home for institutional holidays. The simplest definition separates those ‘de facto’ residents living in a dwelling at the time of a field visit and ‘de jure’ those with an established right of living in a residence. Those with multiple residences is a topic for further research: see NZES.

7 Religion, attendance [Religious affiliation](#)

In NZ the census has (with support of church authorities) asked about religious affiliation, although this question is specified as non-compulsory. This rests on the assumption that people tend to have a broad commitment to one (or other: although usually religious affiliation is usually considered exclusive). The classification could be based on theoretical ideas about different religious orientations (as in the sociologies of religion of Weber) or by type of church structures (sects, cults etc.) but takes a safe route of being alphabetical (at the 1st level of classification). Some American studies have produced a typology of (Protestant) churches along a dimension from fundamentalist/conservative to liberal Smith (1990) and Pew Research Center (nd).

Other aspects of religion involve:

- Behaviour – in particular, frequency of church attendance, bearing in mind some religions do not have churches;
- Previous religious affiliation
- Beliefs (e.g. in God, spirituality etc.).

8 (Political) Ideology/Voting choices.

This is not measured in government surveys (although voting behavior is – see below). Voting choices are usually in terms of the political parties vying for votes, while cutting off the smallest for convenience. Some attempts at providing underlying summary scales have been made: especially the left-right scale which seems well understood by most respondents in surveys, with about 1/6th not knowing about themselves or the major parties (either because they don't know about the scale or the party its being referred to. DKs are much higher in reference to smaller parties. Perhaps a quarter are incorrect in scoring of the major parties. A broader vocabulary could be used which might stretch from socialist to neo-liberal, although whether there is widespread lay knowledge of such terms is unclear.

9 Education/ Field of Study, years of education, type, [Qualifications](#)

Education is divided into preschool, primary, secondary, tertiary and 'adult/further' levels with the latter two often overlapping whereas the boundaries between the other levels are not permeable. Intermediate schooling is sometimes broken off from the broader primary category. Measures can look at involvement with each of these (e.g. years spent), type of education involved and also credentials obtained. Most important is highest formal qualification.

However other measures include:

- Years in education (from primary school, and deleting any years in-between)
- Highest secondary qualification
- Involvement in post-secondary education
- Field of study
- Type of education institution.

According to the relevant chapter in Burgess (1986) “..among the minimum data that are required on academic education are: terminal education age, number of years stayed beyond the school leaving age, last school attended, duration of further or higher education full or part time and details of educational qualifications”. Field of study is a lesser-used variable: see NZCED: https://www.educationcounts.govt.nz/data-services/collecting-information/code-sets-and-classifications/new_zealand_standard_classification_of_education_nzsced).

Type of school attended (e.g. private, public, State integrated schools -schools with a special character) has been asked in some academic surveys.

Since succeeding cohorts are ‘better’ educated, education achieved relative to the average for the cohort may be a better measure.

10 Paid workforce

10.1 Labour force status

Involvement in the paid workforce is crucial for shaping not just working life but also other aspects of people’s lives, and its complexity can require many variables to measure. The basic measure is whether or not a person is in the paid workforce:

- In paid workforce
- Unemployed
- Not in paid workforce.

Having a paid job suffices for the first category, although there is a subcategory for those not being directly paid but working for family (and presumably getting their keep).

A subsequent question can be how many jobs a person has. (Questions often relate only to the main job, with this being seen as the one taking most time or of highest importance to the person). It is sufficient in many studies to ascertain unemployment status by self-report (retaining, though, some ambiguity) but SNZ uses a battery of questions (underpinned by a conceptual schema) to identify unemployment (leading to derivation of the official unemployment rate: e.g. see GSS). Those not in the paid workforce include those at school/education, too young, retired, on household duties etc. (and of course who ‘work’ in such capacities even if not directly paid).

Hours at work is an important further question: although this may vary seasonally for many. The standard for fulltime work has traditionally been 40 hours with part-time work including those working up to 20 or 30 hours (which is the current definition).

Drilling further into any job can look at:

- 10.2 *Employment status*: employer, self-employed or employed (a further question examines the legal status of their employment contract ways in which the person is remunerated) – wages; salaries, etc. ES is the (more or less Marxist) classification of the role of individuals within their employing units: as employers, self-employed and employee – but also unpaid family member.

- 10.3 *Industry/sector* employed in: the economy is ever-expanding while also ownership structures may pull activities together. The current schema includes some 20 categories subdivided into a multitude of some categories. This array is too wide to be readily used in surveys. An underlying classification (developed by NZ economists) suggests that primary (agriculture etc.), secondary (manufacturing), tertiary (service) and are useful groupings, with some adding quaternary (knowledge-based part of the economy). A large number of categories and no readily discernible theory behind these SNZ categories means that it often not easy to use.

- 10.4 *supervisory status* (e.g. foreperson) as a half-way house to management.

- 10.5 *Employment conditions* (e.g. GSS) indicates what sort of contract governs the employment relationship.

- 10.6 *Occupation NZSEI*. [Occupation](#)

Occupation is a key workforce classification since most jobs are embedded within occupational communities and to a considerable extent careers unfold within the contexts of occupations. SNZ provides (a regulated updated) detailed multi-level classification and also online category finder, and the classification is underpinned by a broad conceptual justification in terms of occupational skill level and education required for job). However, it is necessary for social research to have a derived socio-economic scale which was provided for many years by the Elley-Irving scales (see Crothers 2016 for a history of social class scales in NZ) and more

recently has been provided by Barry Milne's work (see Fahy et al., 2017). As well as providing a calibrated interval-level scale attention is focused on how anomalies are best dealt with.

- 10.7 *Institutional sector, Business type*

"IS" refers to the type of ownership of an organisation, which is broadly classified into private, central government, local government, non-profits and others, although more detailed classifications are possible. 'Business type' is a more extensive version covering more particular business circumstances. As well as classifying particular enterprises this classification may relate to the staff within it.

Individual Proprietorship
Partnership
Registered Limited Liability Company (non Co-op)
Co-operative Companies
Joint Ventures and Consortia
Branches of Companies Incorporated Overseas
Government Owned Trading Entity
Central Government
Local Authority Trading Enterprise (LATE)
Local Government
Incorporated and Unincorporated Societies and Associations
Charitable Trusts
Trusts/Estates
Consulates and Foreign Embassies.
Other Business Types

11 *Main means of travel to work*

Given the range of travel we all indulge in developing clear patterns is not easy – although there are specialist travel surveys providing such detail (see <https://www.transport.govt.nz/resources/household-travel-survey/>). Focus tends to be on travel to work, but travel to schooling is also important for certain age-groups. Accommodating blended transport modes and how these alter over time-periods is very difficult.

12 *Military Service*

Current involvement with military service is captured by occupation (where codes tend to prefer respondents to indicate their service rather than their occupation – which has some problematic issues) and past service has been asked in some earlier censuses but this former status seems to have largely lapsed in terms of NZ relevance.

Income/Benefits/Assets. Income bands

Sources of income indicates the range of ways (and sometimes the amounts of money involved) in which income might be obtained and a classification of income bands is also available.

14 *Social Class*

Subjective social class may be assessed using a subjective scale (upper, middle (upper and lower) and lower/working class or using an international scale. Some of these scales draw on information about occupation employment status and supervisory status. See Vowles and also Haddon (2015).

A somewhat related measure is that of an individualized vision of the Index of Deprivation (see above) – see Salmon et al (2005).

15 *Time activity.* [Activity classification for the Time Use Survey.](#)

How time is allocated is an important way people differ, although this is particularly pertinent with time-use surveys.

16 Life style involves the commitment of resources (money, time, energy etc.) in the pursuit of ways of living that are presumably beneficial for those involved. Underlying data comes from long batteries of questions or time budget diaries which are clustered to produce multiple categories. No standardised measures are available, although for interesting attempts see Crothers, 2015.

17 *Marital status* [Legally registered relationship status; Partnership status in current relationship](#)

Many families/households have two 'household heads' who are in a relation of domestic-sharing and perhaps sexual/romantic activity. The legal and 'social' nature of such relationships have classifications together with another identifying opposite-sex or same-sex relationships.

[Type of couple](#) (opposite sex v same-sex)

[Sex of sole parent](#)

18 *Fertility* [Fertility](#)

Fertility involves number of children born to a parent (woman) over their lifetime.

19 *Family /household type (head of Household)/ life cycle stage*

For an extended methodological commentary on studying families in NZ see Ian Pool et al (2007) and for a more focused discussion of the relationship between individual and collective properties see Callister, P, Didham, R., Newell, J, & Potter, D (2007)

Pool et al argue that in order to capture more fully the structural elements involved with families a researcher requires more information on the status dimension of forms:

- whether the couple is cohabiting, in a de facto relationship or married;
- if they are married, whether this a remarriage for either/both partners;
- if cohabiting or de facto, whether this an opposite- or same-sex couple;
- whether the children are the natural children of both parents or stepchildren of either; and
- whether this is a 'reconstituted' family or not and, if so, what constitutes its structures and net-works.

Families are nested within household (occupying a dwelling) in turn within dwellings, sometimes within dwelling-groupings (e.g. a block of flats although the aggregate is seldom used as a unit despite perhaps having organizational arrangements holding it together). In most cases though the three levels are entirely equivalent.

There is no agreed NZ definition of family life cycle stages although common categories include: prechildren; child-bearing, child-rearing, child-lunching, post-retirement, sole survivor. A crucial measure is age of youngest child as this shapes possibilities for returning to work etc.

Given the connection between age and many social/health Superu tables are often presented in order of the average age: viz.

Couple, both aged < 50 years

Not in family nucleus, (e.g. flatting)
Sole-parent, at least one child <18
Couple, at least one child <18
Lives alone, aged < 50
Couple, all children 18 or older
Sole-parent, all children 18 or older
Couple, one/both aged 50+
Lives alone, aged 50+.

Description of household members can be based on a 'household roster' of all members and their relationship to a reference person or the household as a whole.

[Dwellings, households, and families \(standard terms\)](#)

[Family type](#)

[Household composition](#)

[Number of children](#)

[Age of youngest child](#)

[Child dependency status](#)

[Living arrangements](#)

[Relationship](#)

20 Dwellings

Nature of Dwelling Something of a dynamic area of social research as inner city areas densify, and needs to be included more often in surveys. Dwellings can be defined as either occupied or non-occupied with the private or non-private if they are occupied.

A private dwelling accommodates a person or a group of people, and is not generally available for public use. The main purpose of a private dwelling is as a place of habitation, and it is usually built (or converted) to function as a self-contained housing unit.

A non-private dwelling provides short or long-term communal or transitory type accommodation. Non-private dwellings are generally available to the public for reasons of employment, study, special need, legal requirement or recreation. The description of a dwelling as being self-contained is to counter rented rooms, in houses and apartments that share kitchen and/or bathroom facilities, being classified as separate dwellings.

Private dwelling categories contain more details on the type of structure as well as the number of storeys; non-private dwelling categories provide details on the type of institution; other non-private dwelling categories contain categories such as hotels, training camps, and marae.

There is a separate classification for homelessness.

[Dwelling occupancy status](#)

[Occupied dwelling type](#)

[Homelessness](#)

21 [Tenure of household](#)

21.1 Tenure concerns the ownership status of dwellings, and also for renters the type/sector of landlord who owns. Surveys supplement with information on owning further properties whether for holiday accommodating or renting out.

Ownership can be considered an attribute of particular individuals or of the household as a whole.

In recent decades some dwellings are owned by ‘Family Trusts’ – very often also the occupants and it is not clear how such households respond to this question.

21.2 *Sector of Landlord* categories can include (cf. StatsNZ):

- Private Person
- Private Trust (collected in 2001 only)
- Business or Other Organisation
- Local Authority or City Council
- Housing New Zealand Corporation (HNZC)
- Other State-Owned Corporation or State-Owned Enterprise (Other State Landlord).

21.3 [Weekly rent paid by household](#): clearly cost ranges are altered from time to time.

22 *Dwelling size Number of rooms/bedrooms*

Measures of numbers of rooms or more particularly bedrooms are available. There are also measures of over-crowding – or the relation between household and dwelling characteristics – see Goodyear et al (nd).

23 *Household/Dwelling Assets*

[Energy types used in private dwellings](#)

[Number of motor vehicles](#)

[Access to telecommunications systems](#)

[Information and communication technology](#)

A large range of assets might be included, and these necessarily change over time as the availability widens and cost of assets and lowers. Concern tends to focus on heating, vehicles and ICT access. See Perry 2017, and GSS.

24 *Aggregate and Attribute characteristics of Households*

Many of the attributes of individuals in households can be aggregated up to their household: e.g. source of income and level of household income. In particular, there is concern about the distribution of household living standard measures, and in particular poverty. In turn a range of household measures have been promulgated:

- Perry (2002, 2017) and especially the ELSI scale measuring economic standard of living (and its short-form variant), also material deprivation index (DEP-17) and MWI
- Household relative income measures (see Easton (2002); Jensen 1988).
-

25 *Residential Mobility Years in Dwelling*. [Years at usual residence; Usual residence n years ago](#) (n=1 year, 5 years)

26 *Voluntary organisation memberships* [Non-profit organisation](#)

Surveys may include items of membership in voluntary organisation or service in the non-profit sector. Recent censuses have asked about involvement inside and outside the household. The questions about unpaid activities allow people to record the work they do for their own households, relatives, friends, neighbours, and the community in general. This information provides

indicative data on the nature of unpaid activities, as well as the characteristics and location of people involved.

27 Election participation

Many surveys ask whether or not a respondent has voted in a previous local or parliamentary election. Answers considerably overestimate voting undoubtedly because of ‘social desirability bias’.

28 Offences:

The NZ Police and other law enforcement agencies have an operational coding system for assigning offences to particular categories. However, for research purposes some measure of ‘severity’ is needed. The MOJ has issued such studies earlier but the most recent scale is reported in Curtis-Ham & Walton (2017).

Australian and New Zealand Standard Offence Classification (ANZSOC)
<http://www.abs.gov.au/ausstats/abs@.nsf/mf/1234.0/>

There is also a classification of ‘Category of offence’ e trials etc.
<https://www.justice.govt.nz/about/lawyers-and-service-providers/criminal-procedure-act/offence-categories-and-types-of-trials/>

29 Health/Disability

People can be assailed by a large variety of health conditions – whether known to them or not, and these are the subject of a myriad of medical researches. However, overall level(s) of health is a social condition which can be summed. Two scales have been normalised for NZ: and are deployed in the NZ health survey and the GSS.

Disability involves longer term body restrictions. The ‘Washington group’ has developed a ‘social model’ that covers several questions and which has been used in the 2017 WIPNZ survey: see www.washingtongroup-disability.com/washington-group-blog/ and https://workresearch.aut.ac.nz/__data/assets/pdf_file/0009/174915/Internet-in-NZWIP-2017.pdf

30 Previous Statuses/ Contextual Attributes

All the classifications used can be applied to significant others of respondents such as father/male carer, mother/female carer/partner

Father’s/Mother’s occupation, Political ideology, religion etc., previous place of residence, POB

Conclusions

A social research community must keep its data-collection and processing tools well-honed to keep up with developments in society, other institutions and overseas situations. NZ has evolved its own set of social categorisations, much in conjunction with Australia and generally western practise. These have variously been revised and some researched into, but further research is needed on many other social categories: especially those that are particularly sensitive such as gender, ethnicity etc.

What SBCs used in surveys (which measures and with what explanatory success)

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Appendix:

A fairly well standardized list has been identified by Zetterberg (1965) as the schema that pollsters used in describing a person. Many of these items are referred to as face sheet or classificatory variables that are selected from the following list:

I II Past Contextual Variables

- 1 Place of birth (native or foreign); sometimes also parents' place of birth
- 2 Type and size of community in which most of childhood was spent (rural, small town, city, metropolis)

III Present Contextual Variables

- 1 Type and size of community in which the respondent lives
- 2 Geographical region of country

IV Contemporary

- 1 Sex
- 2 Age
- 3 Ethnic background
- 4 Religious affiliation

Statuses: Ascribed Contemporary Statuses:

Contemporary Statuses:

Achieved

- 1 Occupation; sometimes also husband's or wife's occupation
- A classified according to occupation rank (upper, middle, lower)
- B classified according to work situation (salaried, self-employed)
- C classified according to institutional realm (business or industry, civil service or politics, education or science, religion, art, welfare, institutions, private household)

2 Family Statuses

- A Marital (single, married, widowed, divorced)
- B Parental (no children, children living at home, children living away from home)
- 3 Memberships in voluntary associations (including business associations and unions); political party affiliation or preference

V VI Past Statuses

- 1 Father's occupation
- 2 Type of schools attended
- 3 Military Service
- 4 Past full-time occupations Stratification
- 1 Riches
- A Family income
- B Family property a Residence (owns, rents, boards) b Consumer goods (e.g. auto, TV)
- 2 Knowledge or competence

A Years of schooling; sometimes also husband's or wife's years of schooling and children's education

3 Power

A Executive position

B Political office

C Office in voluntary associations (Zetterberg, 1965, pp. 58-60)

Key Variables in Social Investigation, edited by Robert Burgess, Routledge, 2018. ProQuest Ebook Central, <http://ebookcentral.proquest.com/lib/aut/detail.action?docID=5391294>