

**INDICATORS OF EQUALITY AND DIVERSITY IN
NORTHERN IRELAND**

PROJECT EXECUTIVE SUMMARY

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Foreword

This is the fifth in a series of reports from a research project commissioned by the Office of the First Minister and Deputy First Minister to study the development of indicators of diversity and equality in Northern Ireland. The aims of the project were:

- To conduct a literature review on indicators of equality and diversity with a particular focus on their relevance and applicability in Northern Ireland. This included considering the relevant legislative context and identifying best practice nationally and internationally on equality and diversity monitoring.
- To consult and reflect the opinions of key “stakeholders” representative of groups within the nine categories identified under Section 75 of the Northern Ireland Act (1998).
- Through reviewing and extensively analysing existing NI statistics and research, to develop an “equality and diversity picture” of the region; to identify key indicators of change over time; and to consider the potential of existing data to provide useful indicators of equality and diversity
- To consider the relative strengths and weaknesses of approaches that use univariate and multivariate methods to develop measures of equality and diversity; to comment on the technical and socio-economic interpretations of the indicators suggested in the consultation; to identify gaps; and to make recommendations about the way forward in terms of indicator development and future monitoring.

The project reports are as follows:

1. General Literature Review
2. Consultation Exercise
3. Patterns of Social Difference
4. Measuring Change
5. Executive Summary.

This research project lies within the context of the Northern Ireland Government Departments’ Equality and Social Need Research and Information Strategy¹. That strategy committed, amongst other things, to assist the understanding of the extent, nature and causes of inequality and social exclusion in Northern Ireland. The current project whilst reflecting this commitment also reflects the continuous developments in relation to statutory responsibilities placed on public authorities under Section 75 of the Northern Ireland Act (1998).

The report reflects the views of the authors and not necessarily those of Departments.

¹ See: www.research.ofmdfmi.gov.uk/crossdept.pdf

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Executive Summary

1. Literature Review

In this phase of the research, we reviewed and summarised a range of literature on monitoring equality and diversity, the rationale for developing equality and diversity indicators, and the methods and tools employed in the derivation and use of such indicators. The review drew on a variety of sources including academic literature, position papers and the direct experience of organisations that have developed and applied indicators to measure equality of opportunity, process and outcome. It also drew upon local, national and international examples of equality mainstreaming and the development and application of equality indicators as part of this process. The literature review was intended to provide a background to the use and misuse of indicators in this context along with some understanding of the process of mainstreaming equality, and directly to provide guidance about the feasibility of developing equality and diversity indicators for Northern Ireland. The review found:

1. Any history of equality and diversity indicators should start with the development of Social Indicators, not least because these can often be expressed or interpreted as indicators of equality or diversity.
2. The literature on social indicators tells us that, in principle, the measurement of human welfare or well-being needs to take account of the full range of “domains” of well-being (health, adequate material wealth, security etc). Any set of indicators that fails to reflect the variety of components of well-being will be in danger of presenting an incomplete and misleading picture. Conversely, there is a danger in focusing too much on any one inequality dimension as this will imply causality where none is involved.
3. Individuals’ quality of life should be assessed not in terms of an overarching theoretical design, but in terms which are more easily understood and which reflect the variety of ways in which people order their lives. Measures of diversity should reflect this variety.
4. Although equality of *opportunity*, rather than *outcome*, is the avowed aim of most Western societies, the latter is often much easier to measure. At the same time, inequalities in outcomes are often – although importantly not always - pointers to inequalities in opportunities and/or inequalities in process.
5. Where inequality in outcome has been established it is difficult to determine how much of that inequality is attributable to differences in opportunity or process rather than individual choice. Very often the assumption is made that the influence of the latter is negligible. This assumption is likely to be closer to the truth in some equality categories rather than others.
6. Equality of opportunity and process is likely, although not certain, to lead to diversity in those reaching the desired outcome (eg employment at a certain level). This means that, more often than not, indicators of value in monitoring equality can also be used or interpreted as indicators of diversity.

7. Work on population inequalities needs to take account of the fact that individuals often occupy a position on several dimensions simultaneously. This means that univariate approaches to monitoring equality may well give misleading results.
8. The variations observed across an inequality dimension are often not a consequence of being at different points along that inequality dimension. For example, variations in employment rates between different ethnic groups may arise because one ethnic group may include more young people than another or because their prior economic status as migrants makes it more difficult for them to find work. Whether or not variations should be treated as inequalities about which there should be public policy intervention requires careful interpretation of the data.
9. Clearly the notion of a set of indicators suggests a relatively small number of measures, as simple and easily understood as possible, and readily comparable across settings and over time. While this is an understandable and creditable objective, it is important to bear in mind that there are potential dangers in over-simplification.
10. Indicators used to monitor equality of outcome are usually based on “stock” statistics. To monitor properly equality of process or opportunity, on the other hand, often involves an examination of “flows”, or the numbers of people passing from one state to another (eg from unemployment to employment) over a period of time. Statistical methods such as log-linear modelling may be required to attempt to unravel the complex relationships involved.
11. There are major difficulties inherent in objectively monitoring equality and diversity in certain equality categories, particularly political opinion and sexual orientation, on account of the difficulty of obtaining accurate data.
12. It may be feasible to use household surveys to collect data on political opinion and sexual orientation, but other problems arise because of the difficulty of substantiating self-report data, particularly on perceived discrimination.
13. Monitoring utilization of health and other public services across equality groups has to take account of service need (and possibly supply) as well as uptake and will very often call for the use of reasonably complex statistical methods.
14. A number of authors have pointed to the complexity inherent in monitoring equality and diversity and have effectively suggested a multi-faceted approach to the derivation of indicators. One example is the Home Office which has proposed a ‘basket of indicators’ on racial equality including:
 - High level attitudinal data illustrating comparative perceptions of public services between the white majority and ethnic minority communities;
 - Harder and more specific data on a range of key policy areas across Government which directly impact and/or are of particular interest to ethnic minority communities (for example, health, housing etc.); and
 - Data about what the Government itself is doing to improve race equality within the Civil Service.
15. Most sets of indicators proposed in the literature are at a very high level. Although there would be value in compiling many of these routinely, not least to enable trends over time to be observed, they are virtually all outcome based and do not speak directly about equality of opportunity or process.

2. Consultation

The purpose of the consultation phase of the research was to establish in a systematic way the main areas of concern to interest groups in each of the Section 75 categories about inequality in opportunity (the areas of greatest disadvantage). In particular, we were keen to explore what information might be thought to be useful (a) in highlighting such concerns to policy makers and (b) in demonstrating the extent to which inequalities were or were not diminishing. A structured approach was used in which interviewees were asked for their views on key aspects of inequality in the following policy areas:

- Labour Market
- Education
- Crime and Justice
- Health, and Health and Social Care
- Social Security
- Family and Household Structure
- Culture/Social Capital
- Income/Wealth
- Housing
- Transport
- Other measures of quality of environment.

Those to whom we spoke were, as far as possible, from the larger “umbrella” organisations who were representative of a broad spectrum of groups within each S75 category. They were selected from a list of such bodies provided by the Equality Coalition and following discussion with the Equality Commission.

We encouraged people to think about measurable reductions in inequality that could, within reason, be achieved through changes in:

- Policy
- Legislation
- Resources (although remembering this would deprive other activities of funds).

Although we tried to steer those to whom we spoke towards measures of inequality in opportunity rather than outcome or process, the majority of the large number of suggestions (>200) we received were about outcome or process monitoring (including the level of resources devoted to certain activities). Most of these would not require quantitative data.

3. Potential of existing Northern Ireland data

3.1 Equality and Diversity Picture

An unmanageably large number of inequalities across Section 75 dimensions and within policy areas were demonstrated, making it necessary to select the most significant. One

problem was where to draw the line between differences that appear inevitable – or at least obvious – consequences of the S75 dimension itself and differences which one would aspire to see eradicated or at least substantially reduced: for example, does the difference in employment status between disabled and non-disabled people demonstrate a significant lack of effort to make jobs disabled-friendly or merely reflect insuperable differences in ability?

There is also the problem that the impact of the Section 75 dimensions overlap. Multivariate analyses do go some way towards disentangling the inter-correlations, but such analyses are not appropriate for identifying and separating out different causal pathways over time. Whilst techniques (such as log-linear analysis) do exist, a frequent problem is the lack of adequate data.

It is also worth recalling that there are several important divisions that cannot be adequately captured in this kind of individual survey data. An obvious example is the difficulty of obtaining reliable information about sexual orientation through a questionnaire. At least as serious a problem is that the household or individual focus of most surveys means that it is difficult to collect information about collective or social goods and services, other than individual attitudes towards them. For example, one might be concerned about the long term implications of the continuing segregation of the school system, or how the organisation of the criminal justice system might affect groups defined in terms of the Section 75 dimensions.

With these caveats, the following is a list of what appear to be the most significant findings both in terms of the overall policy outcomes and in terms of whether the major inequalities in respect of the Section 75 dimensions have increased or disappeared.

3.2 Overall Policy Outcomes

The following are the major features and shifts over the last ten/twenty years.

Population. The demographic profile has shifted towards a more elderly population, although Northern Ireland still has the youngest age profile of the United Kingdom. Household types are more diverse.

Labour Market. Unemployment has fallen and there is now a more diverse portfolio of jobs with much more part time work than previously.

Education. The overall level of schooling has of course increased dramatically over the last twenty years, as has the number with degree level qualifications. The two school systems continue to coexist. There is a limited amount of data on children's experience of school.

Crime and Justice. Reported victimisation has increased slightly and fear of crime has increased markedly. Confidence in all components of the criminal justice system has increased over the last ten years.

Health. People are more likely to report that they have a long standing illness than they were twenty years ago. Heavy drinking has increased whilst smoking has decreased.

Housing. The quality of housing has improved throughout Northern Ireland

Transport. Many more people now have access to a car and there has been a corresponding decline in bicycle use and in public transport.

3.3 Inequalities in terms of the Section 75 dimensions

The following are the most striking.

Age and Sex. Older women are increasingly less likely than men to be employed. Women are also less likely to be working full-time or to be self-employed. In further and higher education there are more male than female full time enrolments and more female than male part time enrolments. There are more females than males in university; and more females than males currently obtaining degrees, although the proportions of male and female graduates in the population with degrees was almost equal. Men are more likely than women to report good health or being happier and women were more likely than men to report a long standing illness.

Marital Status. Housing and health are two areas where analyses by marital status identify differences in experience. The main differences are between those who are married and those who are separated or divorced. The last two groups seem to fare particularly badly in the housing market and have poorer health than either their single or married counterparts.

Religion. On the whole inequalities between the two groups have converged over the 1980s and 1990s, for example in the labour market and education. Those that persist are in terms of drinking and smoking behaviour with Catholics more likely to be heavy drinkers and to be smokers than Protestants; although confidence in the criminal justice system has increased overall there has been a divergence between the two communities; and inequalities in housing remain although they are probably attributable to different age and household structure.

Ethnic Minority. A much higher proportion of Irish Travellers and, for certain age groups, Chinese immigrants have no educational qualifications. Health status is similar to the remainder of the population except for Irish Travellers. There is substantial housing disadvantage.

Disability. Taken at face value, the findings make for depressing reading; those with a limiting long term illness are in poorer general health, experience greater stress and are more often depressed; they are or were more likely to indulge in risky health behaviour. But the differences are nearly always explicable in terms of the relative morbidity of the two groups in the first place. It is clear that those with a limiting long-term illness are

disadvantaged in terms of education, housing and transport, but in relation to the specific impacts of the differences in relative morbidity, it is not very clear what additional measures a government could take.

Dependants. There is little to say that is independent of marital status, sex and age.

Sexual Orientation. There is no over time data available.

Political opinion. Nothing particularly striking.

Social Class. Whilst not a Section 75 dimension, most of the obvious inequalities have persisted.

3.4 Commentary

Many of the inequalities between the groups defined by the Section 75 dimensions have converged over the 1980s and 1990s. However, some have persisted such as those in terms of drinking and smoking behaviour between marital status groups and between the two communities. A few inequalities have diverged over the 1990s such as confidence in the police and the criminal justice system as a whole.

Perhaps more worrying is that, in terms of a crude but general measure of socio-economic position such as social class, nearly all the inequalities have persisted.

3.5 Key indicators of ‘socio-economic’ change over time

The consultation exercise generated a large number of suggested indicators; but the purpose of this section was to review what appear to have been the main socio-economic changes over the previous 20 years and which are likely to be important issues for the next 5-10-20 years.

The main changes of the last twenty years have been increasing financial prosperity, the changing role of women, especially in the labour market, the demographic shift towards more diverse households especially in terms of single parent households, some convergence in respect of differences between the groups defined by the Section 75 dimensions, but some worrying divergence in respect of confidence in police and the criminal justice system, and persisting socio-economic inequality.

There has also been a major change in the way in which people respond to surveys with increasing sensitivity in respect of long term illness and perceived likelihood of victimisation and anti-social behaviour. It is therefore important to be cautious in proposing and interpreting any indicators that rely on self-reports such as these. On the other hand, there is a lack of data on the well-being of children – over a quarter of the population.

The four main policy issues that have emerged from the analysis of the data available would appear to be the labour market, confidence in the criminal justice system (including the police), health behaviour and housing (with the caveat that some important issues are not covered). Without downgrading the importance of the other dimensions, probably the three most important are ethnic minority, religion and disability; in addition, the analysis in the report would suggest that it is important to maintain an interest in differentials by socio-economic position and specifically to ensure that the role of socio-economic position in accounting for recorded differences along the section 75 dimensions is fully understood.

On this basis, one would perhaps propose the following topics as suitable for the development of indicators (but see the last section):

Labour Market. The economic activity of different ethnic minorities and of the disabled should be monitored using similar indicators to those presented above. Whilst participation rates for the younger age groups would be a simple indicator, it would also be important to monitor any tendency to segregation in the labour market, by examining the occupational distributions of the different groups.

Confidence in Criminal Justice System. Since this is quintessentially a question of *confidence* then this can only be monitored through the kinds of questions being used in the NILTS surveys. However, it will be important to check that there are no obvious changes in the patterns of exclusion from the sampling frame in the ways suggested above.

Health Behaviour. The decline in smoking is to be welcomed whilst the rise in heavy drinking among all age groups should be monitored because of the health/medical implications, because of possible public disorder implications (especially among the younger age groups) and because of the implications of caring for older people who are more likely to be heavy drinkers. There is also the problem of obesity where the only data is self-report height and weight; this should be rectified in future surveys.

Housing. There is still a divide between many of the groups in terms of their position in the property market. This appears, to a greater or lesser extent, to be related to age and demographic profile associated with the categories of marital status, religion and dependants.

In addition, given the caveats about the household and individual focus of many of the survey findings, it would also be important to monitor at a different level. The following are only a sample of possible suggestions:

- Segregation and eventual polarisation in both the labour market and the schooling system
- How the organisation of, for example, the criminal justice system might discriminate against certain groups. (This could be monitored through simply examining the numbers of each community on remand etc. or through process indicators like the level of bail being set for different communities.)

- Political apathy.

4 Conclusion: Way forward for future monitoring.

Many of the pertinent points have already been raised:

1. The context of growing financial prosperity and stagnating life satisfaction.
2. The importance of defining indicators in measurable ways.
3. The importance of being careful about the interpretation of household or individual survey data when there is a focus on potentially excluded groups because they might be at least partially excluded from the survey in the first place.
4. The overly individualistic focus of the data available.
5. The dramatic changes in sensitivity to illness and to insecurity and how those should be considered in assessing change.
6. The overlaps between the impacts of many of the Section 75 dimensions and the inadequacy of the data to disentangle the effects in a rigorous causal sense.
7. The persistent effect of socio-economic inequality, which is not of course a Section 75 dimension.

Points 1 (contrast between GDP growth and life satisfaction), 4 (individualistic focus of data available) and 5 (rising sensitivity to ill-health and anti-social behaviour), together suggest that the wrong aspects of the quality of life are being monitored. Points 3 (structural problems with household surveys) and 5 (rising sensitivity to ill-health and anti-social behaviour) imply that the data generated through current data collection procedures may be being interpreted without due care and attention. Points 6 (overlaps between section 75 dimensions) and 7 (persistent effect of socio-economic inequalities) reinforce the problem of interpretation. Finally, point 2 (defining indicators in measurable ways) demonstrates that this has to be a carefully thought out process rather than one that can be dealt with in a short interview (as was the case with the consultation exercise).

Measuring and interpreting differences in a range of policy outcomes between groups of individuals along nine dimensions is considerably more complex than might have been appreciated when the legislation was drafted. This is because:

- There is considerable overlap across the Section 75 dimensions in their impact
- Differences between groups may be wholly or partly attributable to differences in the makeup of the groups
- Individual-level data derived from household surveys are usually highly correlated within households
- Making reliable inferences about whether observed inequalities constitute inequity usually involves the use of statistical methods such as multivariate analysis, multi-level modelling and/or log-linear analysis
- While not a panacea by any means, more sensitive analytic approaches can usually unpack impacting factors more than univariate/bivariate approaches.

However, such techniques often have limitations because of lack of data and problems of interpretation.

Any attempt to derive a manageable set of indicators of equality and diversity would clearly need to have regard to methodological issues such as those above and also to broader social and political questions, such as the dimensions in respect of which there should be no discrimination (which is the focus of the section 75 legislation), but also on what *are* the desired policy outcomes. Ideally this would require input from the public (or their representatives in an elected Assembly) as without a consensually agreed definition of what counts as important, monitoring may be limited in value.